TimePunch

TimePunch Client 2.8

User Manual

Document Information:

Document-Name	User Manual, TimePunch Client 2.8
Revision-Number	176
Saved at	08.10.2015
Number of Pages	79

Publisher:

TimePunch KG

Wormser Str. 37

68642 Bürstadt

Table of contents

Introduction

This document describes the use of the TimePunch Windows client and the holiday editor.

As further documentations there are user manuals of the TimePunch Watcher and the synchronization assistant available. Therefore this parts won't be described here at all.

Installation

The TimePunch Windows Client can be downloaded and installed from our Website http://www.timepunch.de. The installation will be done with our TimePunch Setup executable.
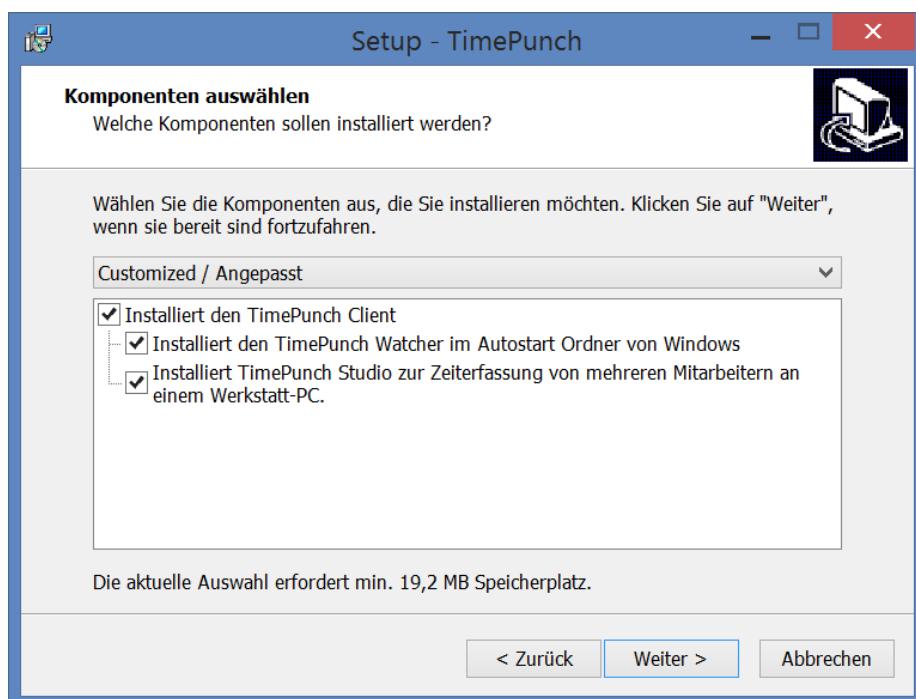
The following options can be chosen:

Option	Description
TimePunch Watcher Installation	Der TimePunch Watcher is used for the automatic time recording of the working time at the PC of the employee. It's most useful, if the people are working the most time at their PC.
TimePunch Studio Installation	TimePunch Studio is a software that runs at a standalone PC and can be used to track the logon and logoff times for multiple users.

Product line

After the successful installation of TimePunch the product line selection dialog will be shown. Within the 30 days test period the product line can be switched in order to test the different versions of TimePunch.
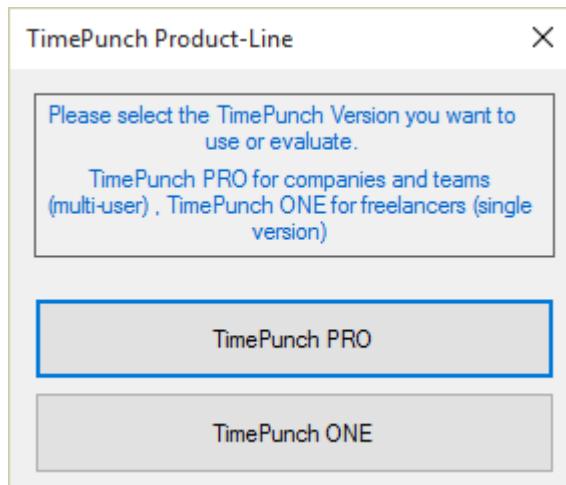
In order to switch the product line, you have to select the menu "Help / Choose Product-line …"

	TimePunch PRO for enterprises	TimePunch ONE for self-employed
Time-tracking at PC	✔	✔
Mobile time-tracking with smartphone	✔	✔
Time-Tracking at a terminal PC	✔	
Time-Tracking with RFID transponder	✔	
Support of the TimePunch Application	✔	
Project management	✔	✔
Time sheets	✔	✔
Public holiday calculation	✔	✔
Project reportings / Cost splitting	✔	✔
Staff administration	✔	

Employee monthly reports	✔	
Working time models / flexi time	✔	
Vacation planning	✔	
Teams / Departments / Branches	✔	
Export reports to Excel or PDF	✔	✔
Data storage	Microsoft SQL Server / Local Database	Local Database

Creating a new database

After the first start of TimePunch there's no database in place. In order to use TimePunch it's therefore necessary to create a new database. That can be done within the Logon dialog by using the menu "File / create a new database ..." or the corresponding buttons and the lower right corner.
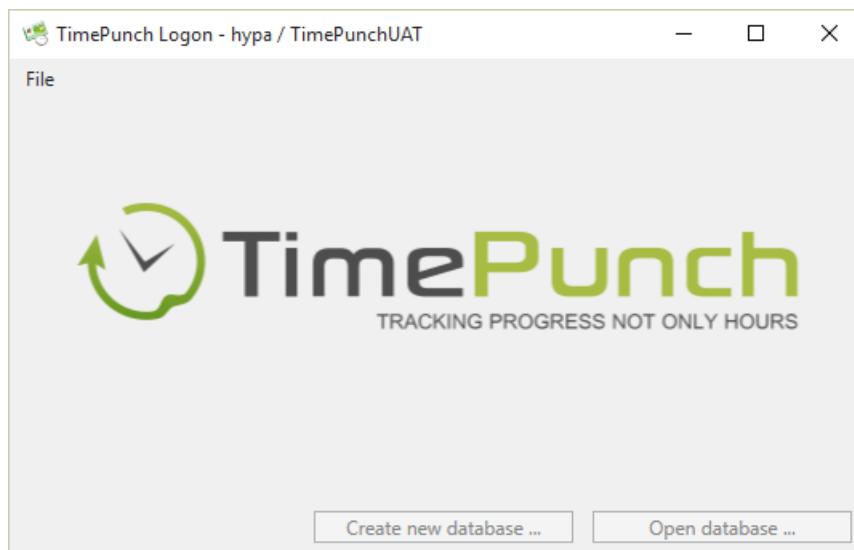
This opens a new assistant that leads the user through the necessary steps in order to create a new TimePunch database.
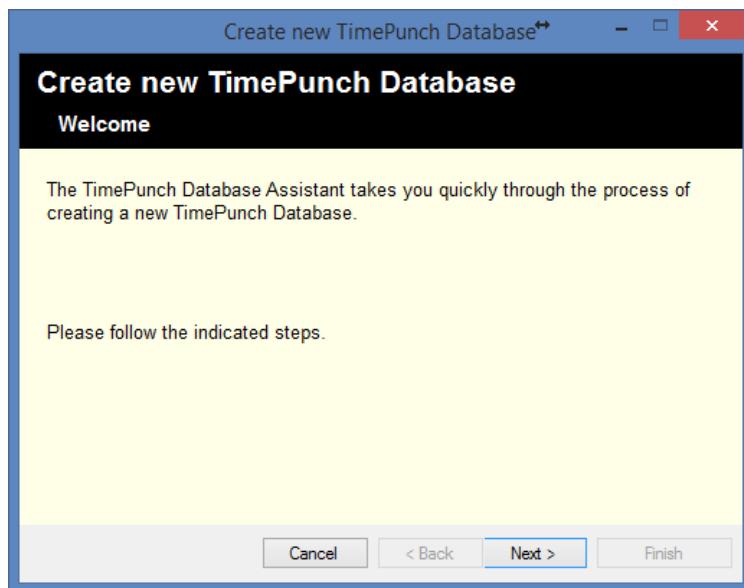
Important: Most times local databases gets created by this. If you plan to use TimePunch on a server, it's recommended to create and manage the database with the TimePunch Application Server. In this case the use of a Microsoft SQL Server or Microsoft SQL Server Express is mandatory.

The configuration of the Microsoft SQL Server is described in detail in the following document: http://www.timepunch.de/doc/TimePunch-SqlServer-1.0-en.pdf

After the database has been created, a new staff profile for the user has to be created. This can be done with "Create a new profile"
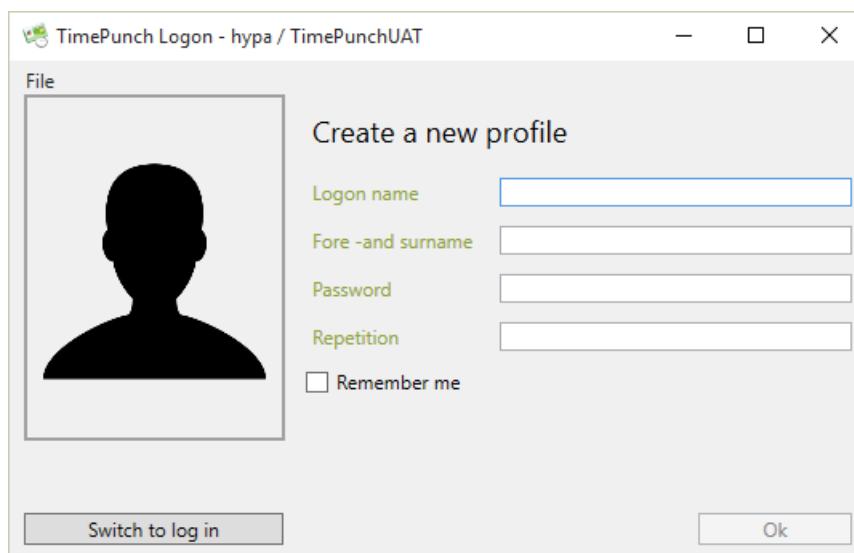
Make use of an existing database

At the same logon dialog it's possible to open an existing database. This might be a database that has been created at the server or by a different PC. Also at this point an assistant gets opened that leads through the process of opening the database.
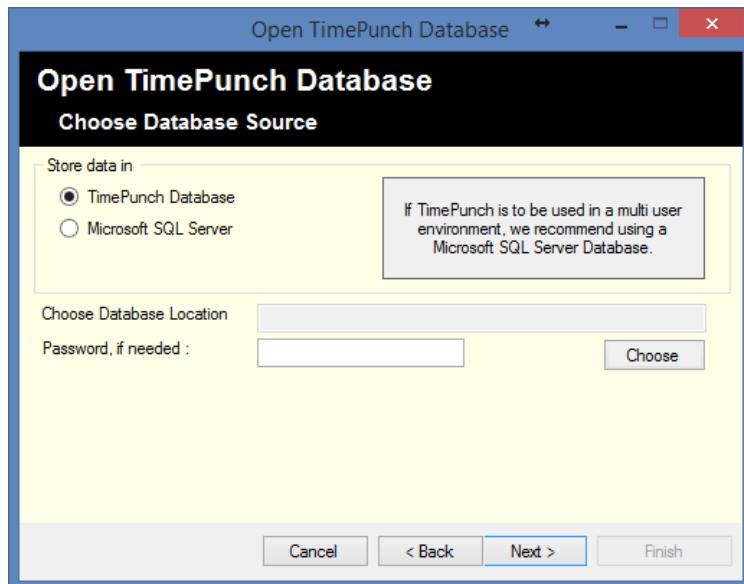
After the database has been opened successfully, the user can logon with the logon dialog at TimePunch.

Therefore an existing profile can be selected or a new profile can be created.
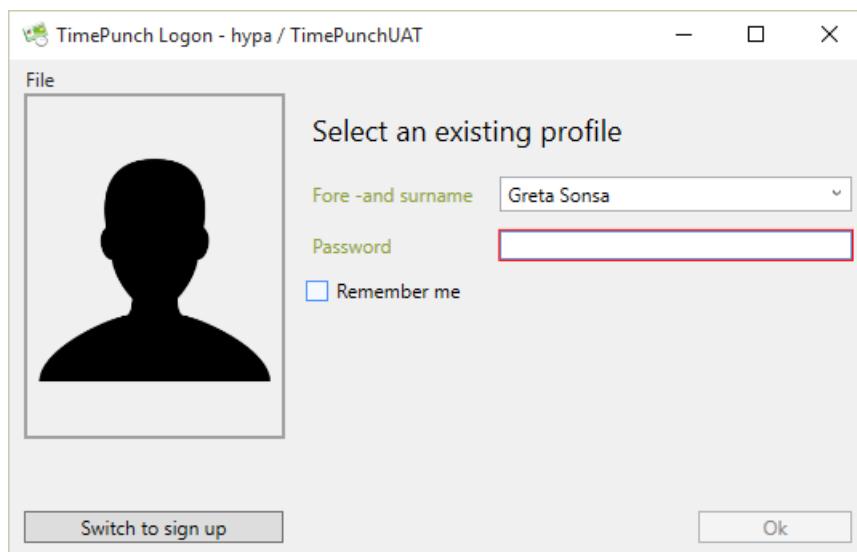
Overview

The TimePunch client is used to manage the working times. Depending on the permissions and the product line, only the own working times or the working times of all staff members can be displayed.

User Interface

The user interface of TimePunch looks like that:

Staff member profile

The staff member must be selected via the member selection drop down in TimePunch PRO. After selecting the member a click to the staff symbol opens the staff member profile dialog.
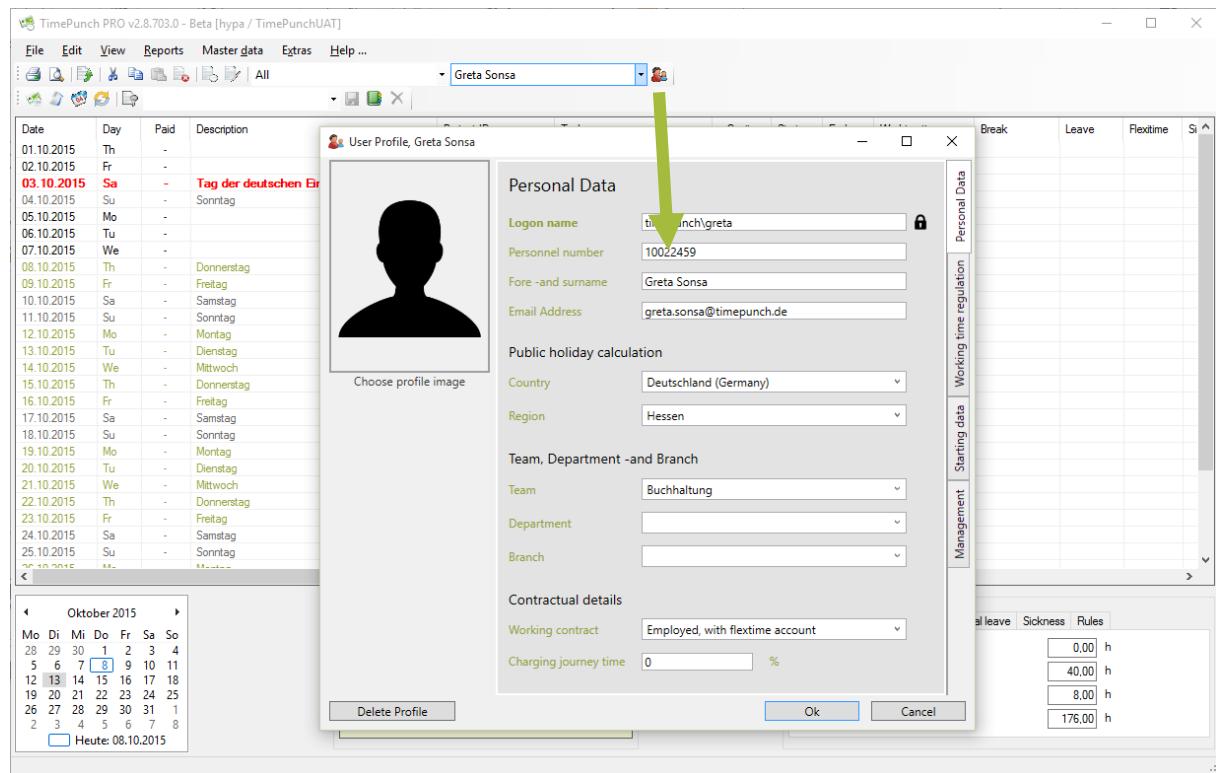
As an alternative the profiles can be management with "Master data / staff member profiles".
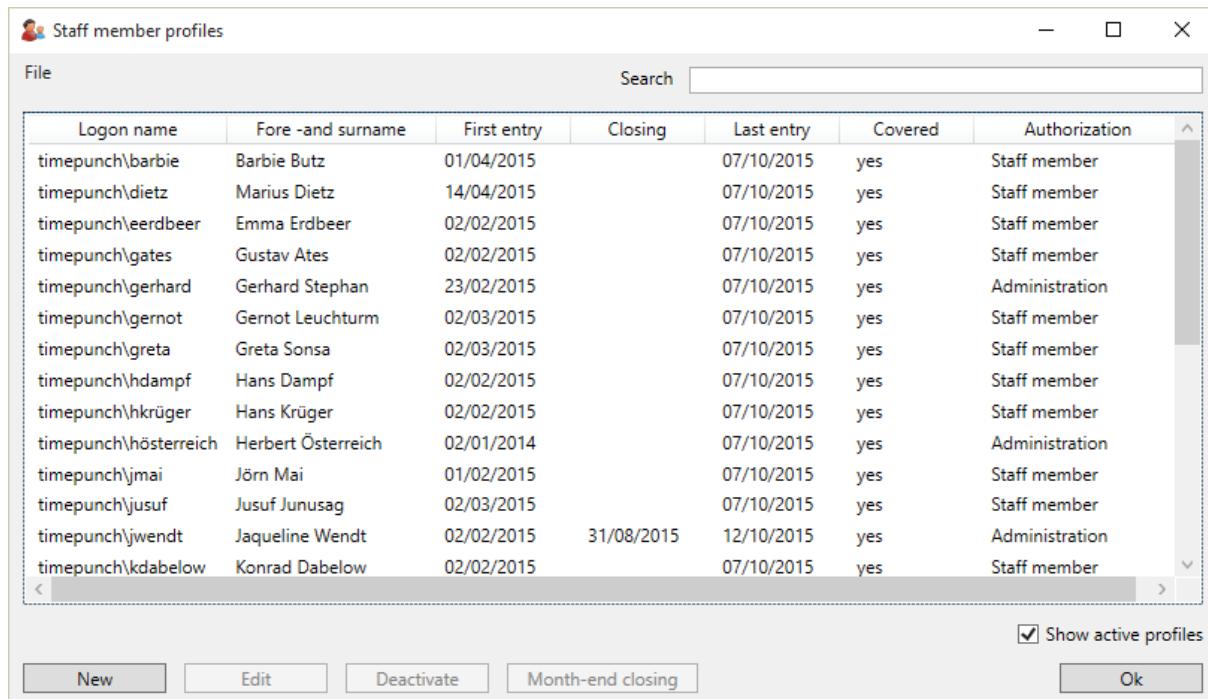
| Logon name	Fore -and surname	First entry	Closing	Last entry	Covered	Authorization
timepunch\barbie	Barbie Butz	01/04/2015		07/10/2015	yes	Staff member
timepunch\dietz	Marius Dietz	14/04/2015		07/10/2015	yes	Staff member
timepunch\eerdbeer	Emma Erdbeer	02/02/2015		07/10/2015	yes	Staff member
timepunch\gates	Gustav Ates	02/02/2015		07/10/2015	yes	Staff member
timepunch\gerhard	Gerhard Stephan	23/02/2015		07/10/2015	yes	Administration
timepunch\gernot	Gernot Leuchturm	02/03/2015		07/10/2015	yes	Staff member
timepunch\greta	Greta Sonsa	02/03/2015		07/10/2015	yes	Staff member
timepunch\hdampf	Hans Dampf	02/02/2015		07/10/2015	yes	Staff member
timepunch\hkrüger	Hans Krüger	02/02/2015		07/10/2015	yes	Staff member
timepunch\hösterreich	Herbert Österreich	02/01/2014		07/10/2015	yes	Administration
timepunch\jmai	Jörn Mai	01/02/2015		07/10/2015	yes	Staff member
timepunch\jusuf	Jusuf Junusag	02/03/2015		07/10/2015	yes	Staff member
timepunch\jwendt	Jaqueline Wendt	02/02/2015	31/08/2015	12/10/2015	yes	Administration
timepunch\kdabelow	Konrad Dabelow	02/02/2015		07/10/2015	yes	Staff member

☑ Show active profiles

[New] [Edit] [Deactivate] [Month-end closing] [Ok]

By using the "Edit" button or with a double click at the profile the dialog to manage the user profile gets opened. The dialog consists of four areas – the work contract, the working time and the starting data and the management.

Important: The column "Covered" shows if the member profile gets covered by the current user. Covered means not necessarily that the profile is editable by the user. It's more an indicator that the member is part of a group (e.g. Team / Department / Branch) that is managed by the user. Therefore the user is set as a group leader or assistant. The effective rights are derived by the permissions of the current user.

Create a new staff member

By using the button "New" a new staff member can be created in TimePunch. Therefore the logon and the fore –and sure name of the staff member is necessary.
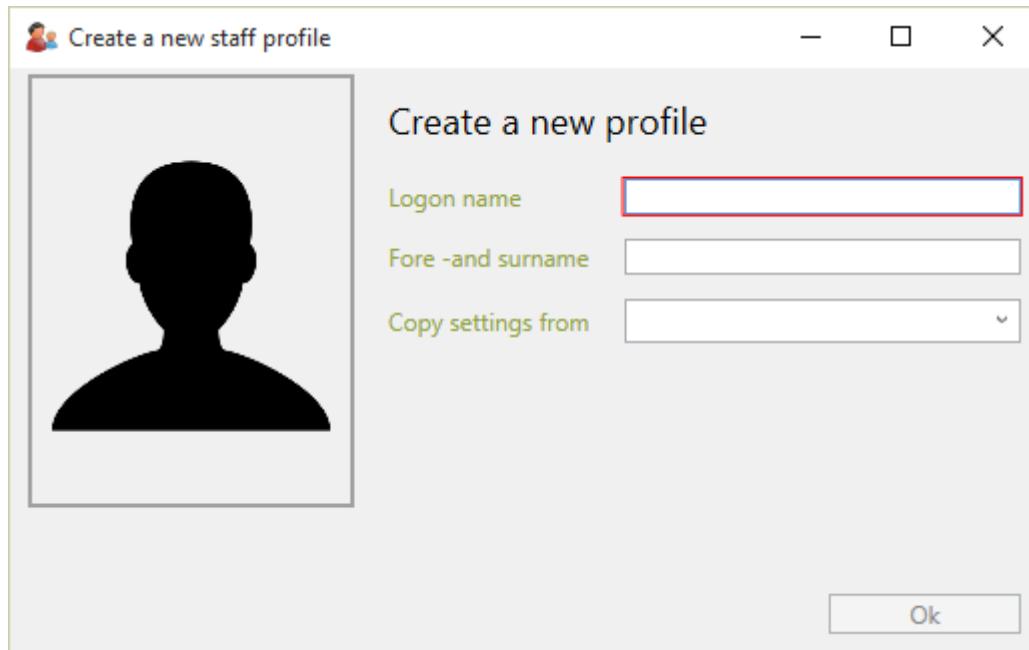
By using the selection list "Copy settings from" an already existing profile can be selected. If a profile has been selected, the working time model, the public holiday settings and flexi time account rules will be copied. This saves a lot of time when creating the initial member profiles.

Personal data

At the first page the personal data of the staff member gets defined.
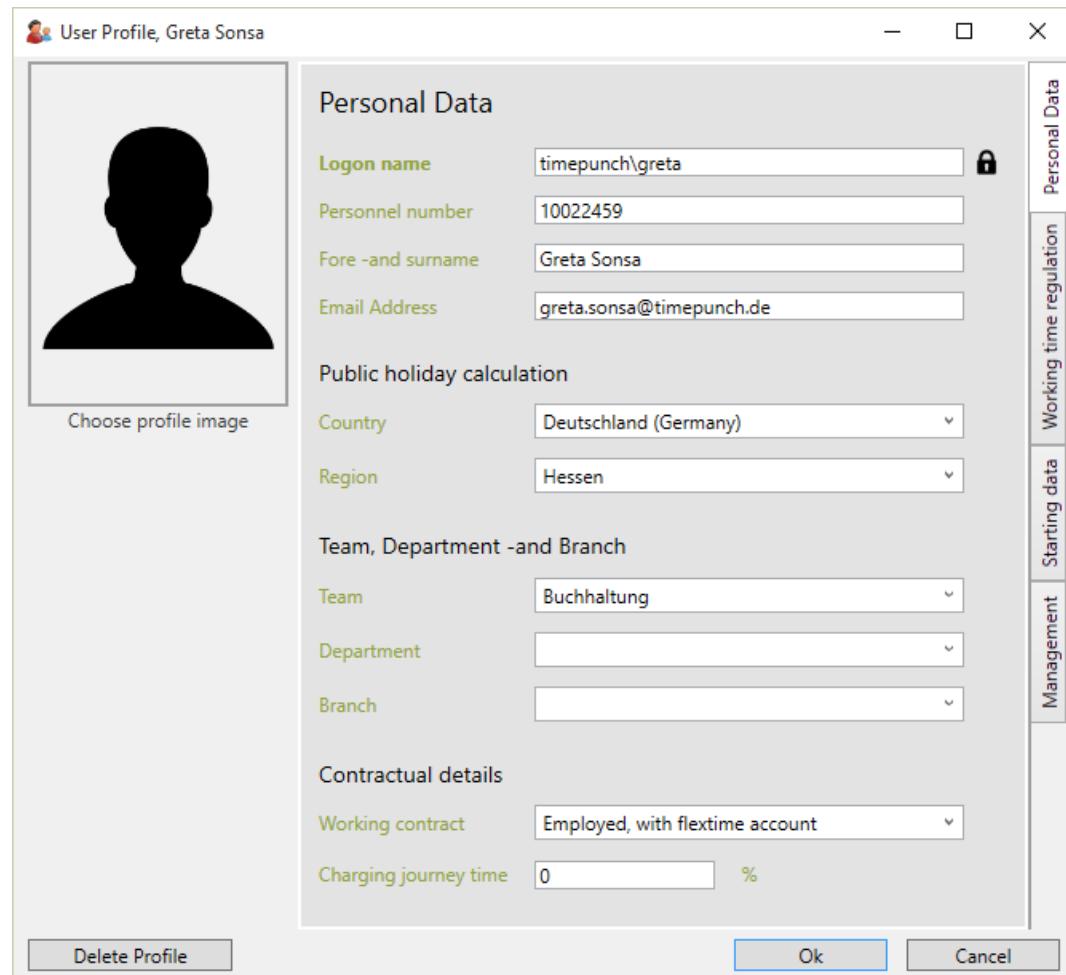
The personal data consists of the logon name, the personnel number, the fore –and sure name and the email address of the user. Additionally the base for the public holiday calculation can be defined.

The team, department and branch selection defines the membership in the distinct groups. The groups can be managed in the Master data menu of TimePunch.

At last the contractual details can be defined. At this point one can distinct between employed or self-employed, which means that in the first case a flexi time account will be created and in the second case, only the time recording can be used.

Important: The Logon name can only be changed, if prior the security lock at the right border of the input fields has been unlocked.

Working time regulation

At the second page "Working time regulation" the settings that applies to the flexi time account can be set.

Important: This data always refer to the current month the upcoming ones. If data shall be changed in previous months, e.g. the public holiday settings, then this needs to be done in the analysis field of the TimePunch main screen.

Working time models

Using the button "Edit working time model" a dialog opens which can be used to edit the working time models.
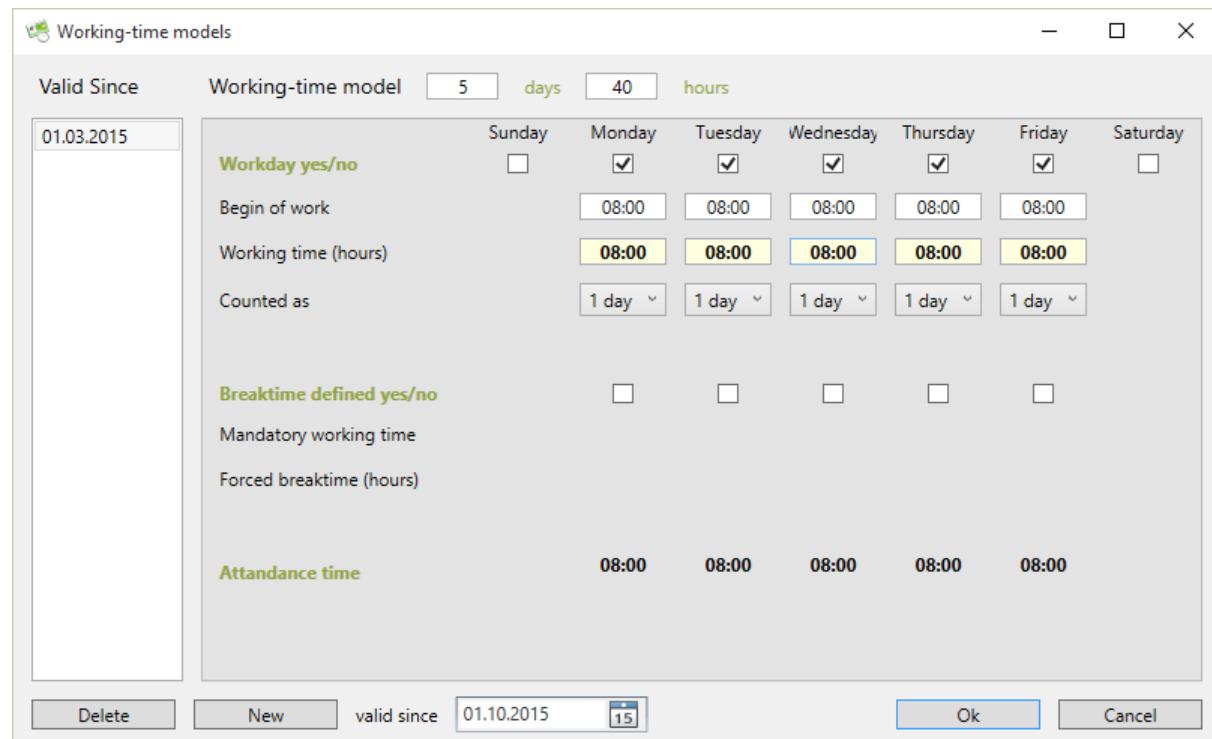
Important: The working week stems from the working time model and cannot be changed in the profile.

Flexi time account

At the flexi time account area the overtime calculation will be defined. At first this means the overtime that is compensated with the employee's contract. That means it can be defined from which amount of work it will be counted as overtime.
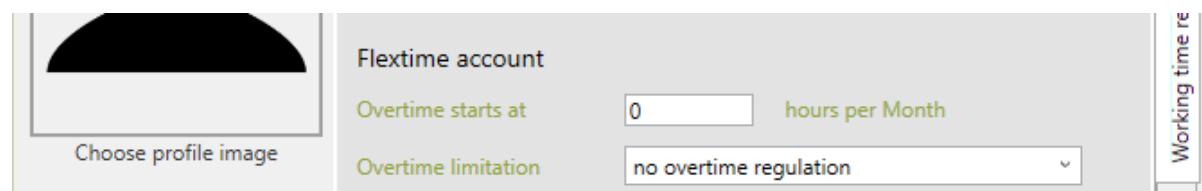
On request, the overtime can be limited per month or a total. This can be done with the second selection:

"Regulate accumulated overtimes" means that the employee can only have a limited overtime in total.

"Regulate monthly times only" means that the employee can only have a limited amount of overtime in month, but in total unlimited.

All working hours that are done beyond the limitation will be cut or paid out automatically, if the checkbox at "Overtime above the limit will be paid automatically" has been set.
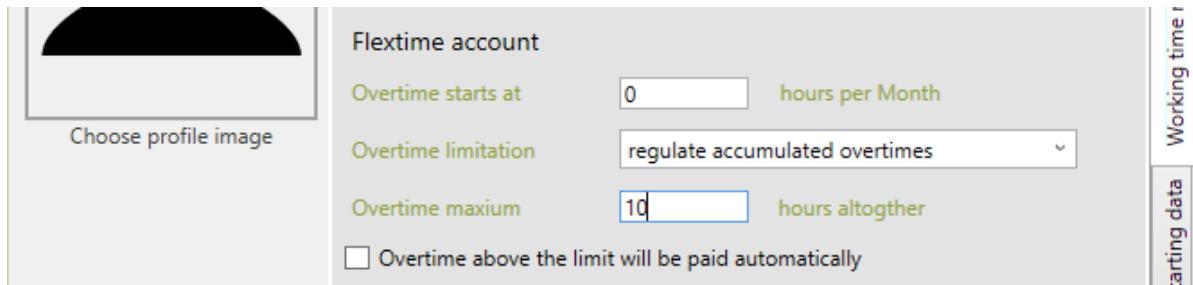
Paid leave calculation

In this area the details of the annual leave can be defined. First the month in which the leave carry forward takes place can be set. By default this is January, but each other month can be chosen also.
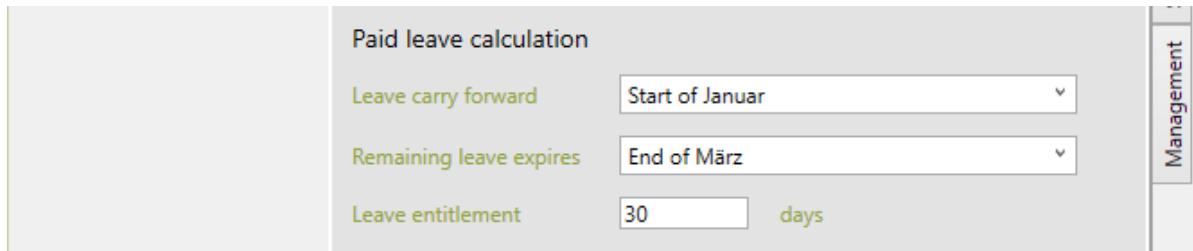
Second the date of expiration must be set, which is the time when the previous annual leave expires.

At the field "leave entitlement" the amount of leave that has been written in the work contract must be entered.

Starting data

At the third page the starting data of the staff member can be defined. The starting data consists of the overtime, the sickness days and the remaining annual leave of the employee.
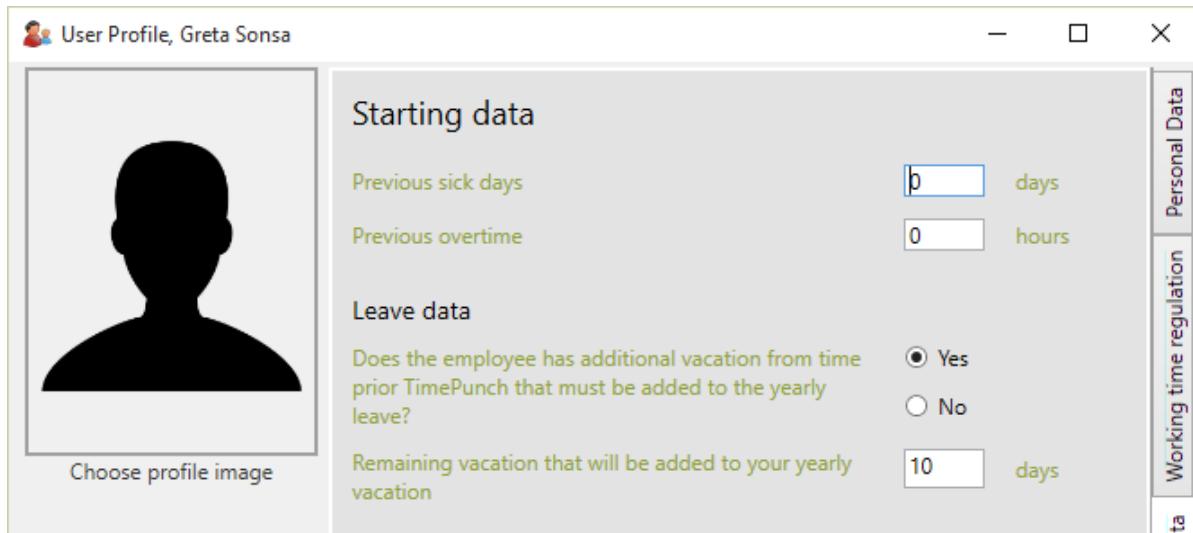
Even if an employee starts during the year, the remaining vacation days need to be entered.

Example: The employee has an annual leave of 30 days, but starts in the companies in July. In this case, the 15 vacation days remaining for the first year need to be set as the starting data.

Similarly, if the employee has additional annual leave, this also needs to be entered in TimePunch.

Management

At the last page "management" the authorization of the staff member can be defined, the license can be set and the logon password can be entered.
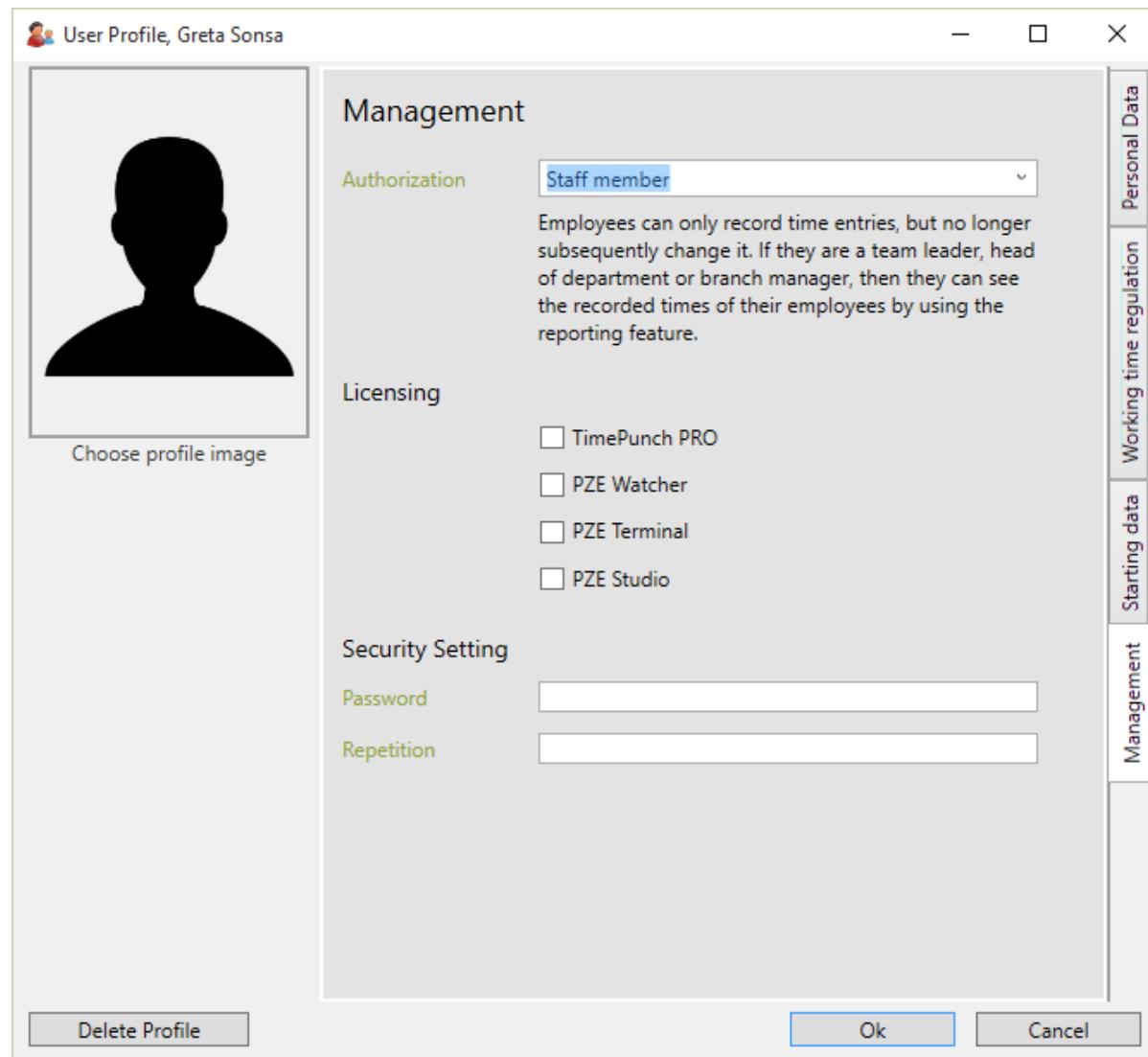
Authorization

In TimePunch there are different authorizations. The superior authorization includes the permissions of the minor authorization.

Permission	Description
Administration	Administrators have the right to use all the features offered by TimePunch. They're allowed to manage the time entries of all users and delete or create new time entries. In addition, they can manage all settings.
Human resources management	Human resources managers may manage time entries of employees that belong to a team, a department, or branch office, which is managed by them.

Permission	Description
Project management	Project managers are allowed to create and amend projects. They can access the project times by the project reports.
Staff member in position of trust	Staff member in position of trust can create own time entries and modify existing time entries.
Staff member	Staff member can only record time entries, but no longer subsequently change it. If they are a team leader, head of department or branch manager, then they can see the recorded times of their employees by using the reporting feature.
No Access	Staff member in this group are archived and can be reactivated for a subsequent evaluation of the times.

Licensing

The licensing defines how the user can make use of TimePunch. The description of the different licenses can be found at "Types of licenses in TimePunch".

Security Setting

The staff member can set their own password at this page. Alternatively the password can also be set by a member of the administration group.

Important: If the logon name gets changed, the password must be changed as well because of security reasons.

The working time model in detail

TimePunch can handle a distinct working time model for each day in the week. The structure of the daily model is always identical for each day - as you will see.

The checkbox workday (yes/no) defines, if the employee has to work at this day.

If the employee is working a day, the regular starting of work is needed next. The regular start of the work is independent of the concrete booking time and it's used only for planning and better overview.

The third line "Working time (hours)" specifies how many hours the employee need to work on that day. The planned time of the employee in the month is calculated with this claim.

As the last mandatory field, one must specify whether the work day as a full day or half day is counted. This is important for the management of the holiday. If part of the working day (counted as) is half a day, then only half will be deducted holiday in case of a leave.

By setting the pause time it can be defined, if and when a minimum pause is automatically deducted. The forced break sets which breaks time at least from the set work time is booked. Bay of employees a shorter interval or even none, then the manual posted break period gets extended to the forced break.

Changing the mode of employment full time to part time

If employees want to change from full-time to part-time work, or after maternity leave, rise again as a part-time force, then this must be represented in the working time model.

To do this, a new working time model need to be created where the date must be applied when the employee changes employment.
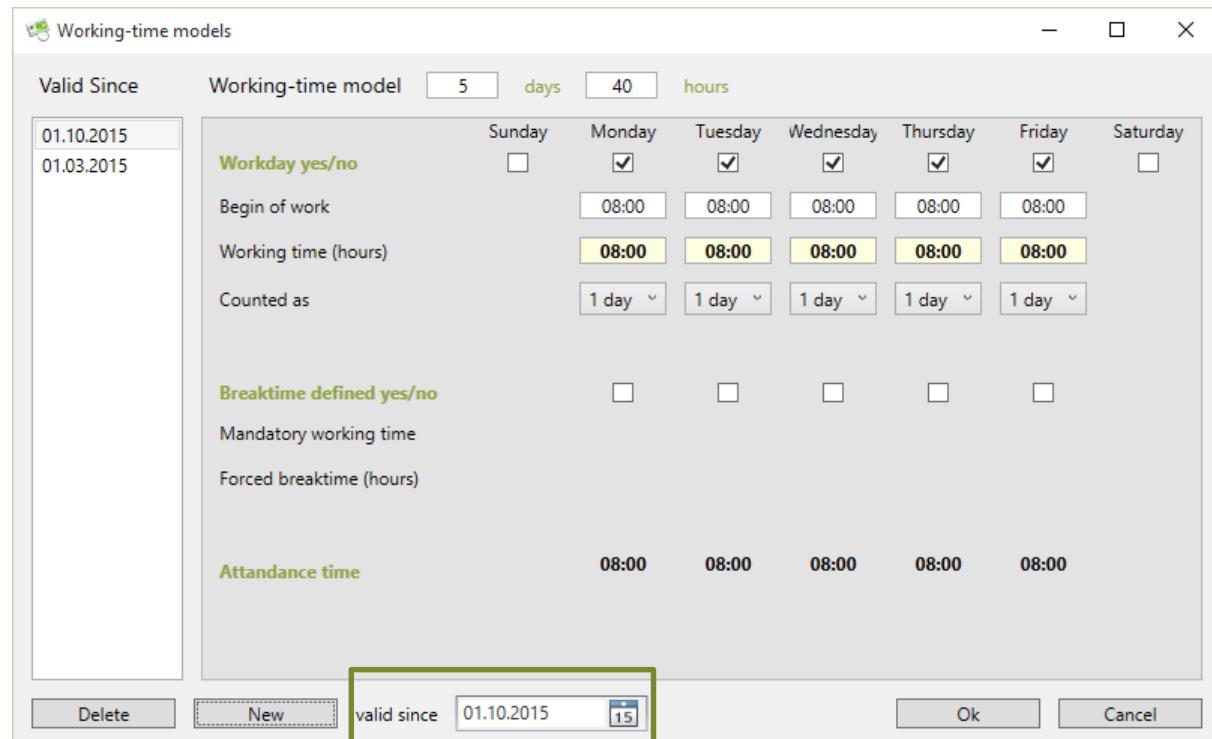
To do this, the launch of the new work time model must be entered in the dialog box next to the button 'New'. Then the button "New" needs to be pressed. As a result, the newly created time model will be displayed in the list and shown at the right.

Accidentally created working arrangements can be removed by using the "Delete" button.

Import and export staff member profiles

Within the master data the staff member profiles can be imported and exported by using the menu called "File".

This happens mainly by importing and exporting CSV files. For the import it will be supposed that the first row contains the column title. The title defines the content of the column. The column order and completeness is not important as long the mandatory field "Logon name" is filled.
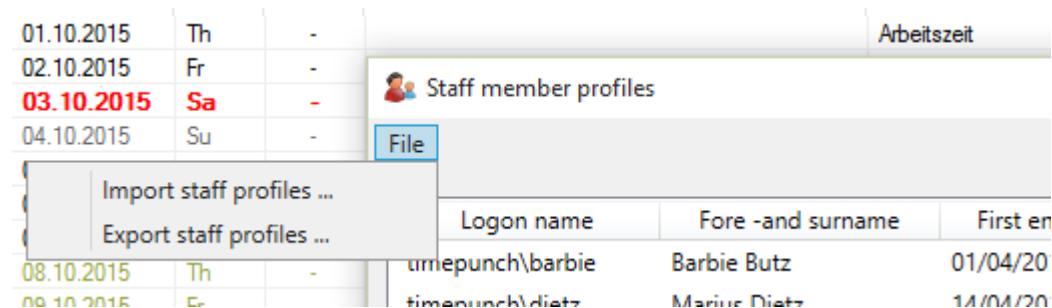
Hint: The easiest way to create an import template is to export a set of test data using "file / Export staff profiles" and save as CSV file.

Employee Monthly Report

It's recommended to create a monthly report for the previous month when the new month starts. This report can then be attached to the personal employee files and can be used as a proof of the working time, flexitime and annual leave.

The report can be accessed by the menu "Reports / Monthly Report" in TimePunch PRO.

Monthly report for Jaqueline Wendt 3/2015			04.04.2015
Fore -and surname	Jaqueline Wendt		
Personnel number			
Working contract	employed		
Country	Deutschland (Germany)		
Region	Hessen		

Working time				**Sickness**		
Working time		137:40 h		Sick days in month		0,00 days
Sickness	+	---		Sick days in year		0,00 days
Leave	+	40:00 h				
		177:40 h		**Leave**		
Estimated working time	-	174:30 h		Leave in month		5,00 days
Overtime	+	3:10 h		Leave in year		10,00 days
Overtime starts at		0:00 h				
Overtime (corrected)	+	3:10 h				
Paid overtime	-	3:00 h		**Leave entitlement**		
Missing hour compensation	+	---		Leave entitlement		30,00 days
Remaining overtime	+	0:10 h		Leave in year	-	10,00 days
Overtime previous month	+	2:30 h		Leave carry forward		Begin of Januar
Overtime limitation		no regulation		Leave from previous year	+	0,00 days
Overtime maximum		---		Remaining leave expires		End of März
Total overtime	+	2:40 h		Remaining leave		**20,00 days**

Employee overview and displaying the current working time models

Using the report "Employee Overview" the working time models of the employees can be printed out. Additionally one get an overview of the current remaining leave and the cumulated overtime of the employees.

That makes it easier searching for discrepancies regarding the working time models.

Employee Overview 2/2015 - 2/2015
04.04.2015

Month 2/2015

staff member	Su.	Mo.	Tu.	We.	Th.	Fr.	Sa.	weekly hours	weekdays	Leave (year)	Taken Leave (year)	Taken Leave (month)	Remaining leave	Sickdays (year)	Overtime (month end)
Emiliy Erdbeer	-	8:00	8:00	4:00	-	-	-	20:00	3	18,00	0,00	0,00	18,00	0,00	0,00
Gerhard Stephan	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	30,00	0,00	0,00	n/a	0,00	n/a
Gernot Leuchturm	-	8:00	8:00	8:00	8:00	8:00	-	40:00	5	30,00	0,00	0,00	30,00	0,00	15,00
Gustav Ates	-	8:00	8:00	8:00	8:00	8:00	-	40:00	5	30,00	0,00	0,00	30,00	0,00	0,00
Hans Dampf	-	8:30	8:30	8:30	8:30	6:00	-	40:00	5	30,00	0,00	0,00	30,00	0,00	0,00
Hans Krüger	-	8:00	8:00	8:00	8:00	8:00	-	40:00	5	30,00	5,00	5,00	25,00	7,00	5,99
Jaqueline Wendt	-	8:00	8:30	8:30	8:30	6:00	-	39:30	5	30,00	10,00	0,00	20,00	0,00	2,50
Jörn Mai	8:00	-	-	8:00	8:00	8:00	-	40:00	5	30,00	2,00	0,00	28,00	0,00	0,00
Konrad Dabelow	-	8:00	8:00	8:00	8:00	-	-	32:00	4	24,00	0,00	0,00	24,00	0,00	0,00
Maria Neufeld	-	8:30	8:30	8:30	8:30	6:00	-	40:00	5	30,00	5,00	0,00	25,00	0,00	0,00
Paul Weise	-	8:00	8:00	8:00	8:00	-	-	32:00	4	24,00	0,00	0,00	24,00	0,00	0,00
Sven Schuster	-	8:30	8:30	8:30	8:30	6:00	-	40:00	5	30,00	0,00	0,00	30,00	0,00	0,00

Information: For self-employed staff members no working-time-model is stored. This will be shown with an "n/a" (not applicable) in the employee overview.

Enter new time-entries and edit existing

In order to amend the time-entries of a staff member, one has to select the member in the member list of TimePunch PRO.
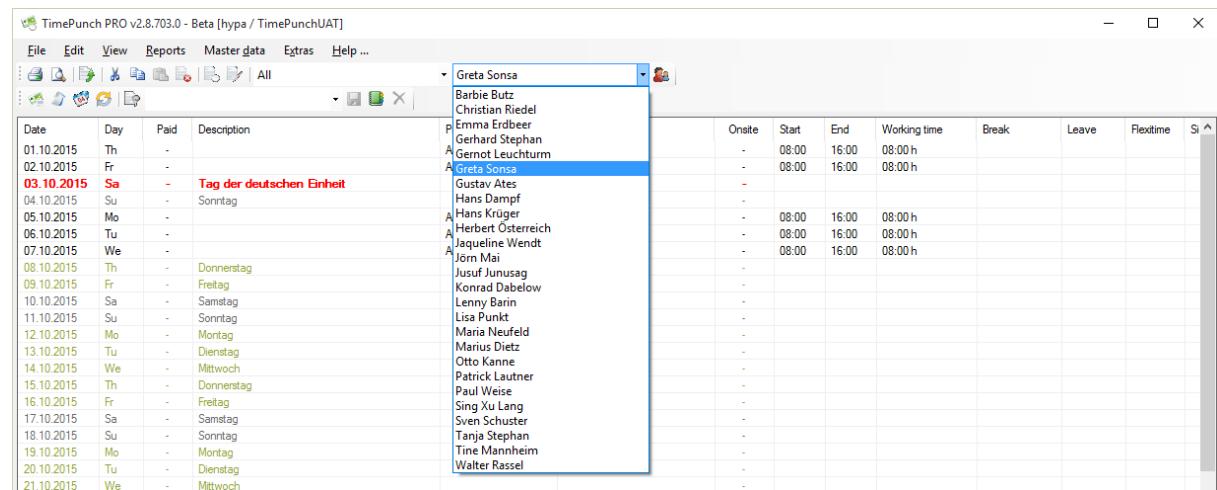
Edit time-entries / create new one

With a double click to a time entry it can be modified. With a right click to it, it opens the context menu in which one can choose a command to create or edit a time entry.
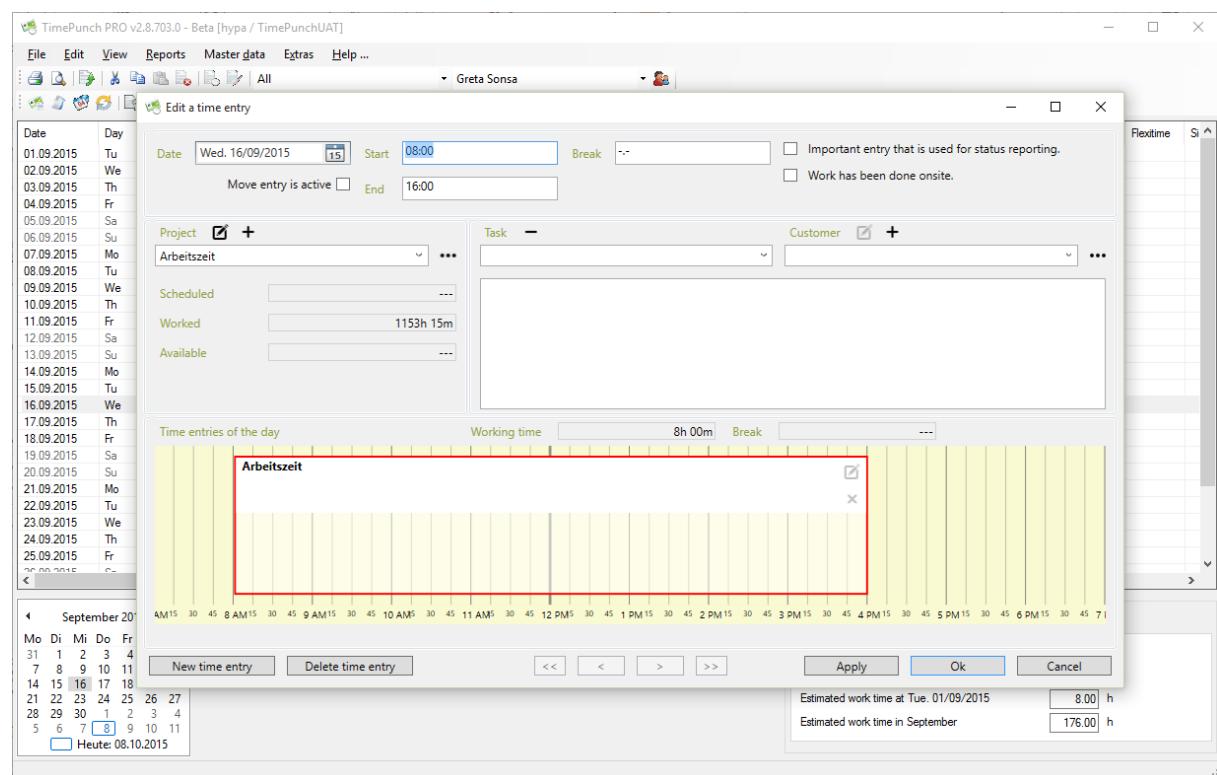
Differences: Time entry, several days' duration entries, time entry array

In TimePunch time entries can be created different ways. The menu offers three possibilities in order to create time entries.
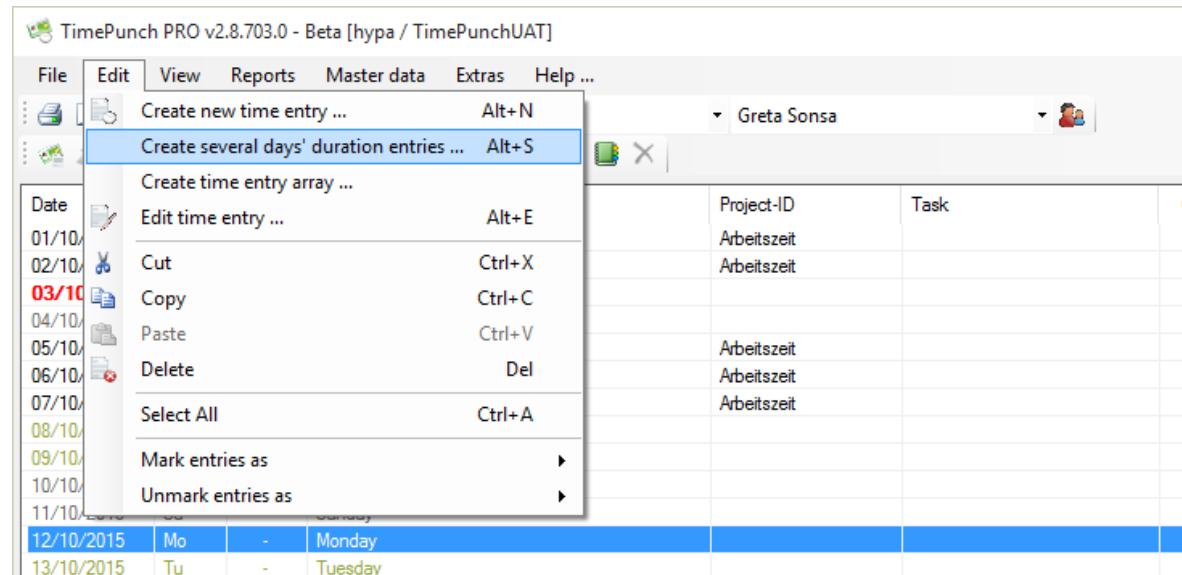
Create new time entry

Using this feature a single time-entry can be created. The time entry starts and ends at the same day.

Create several days' duration entries

Several days' duration entries don't use a start or end time, but a daytime like morning, midday or evening.

The concrete start and end time will be taken from the working time model. This makes it easy to enter leave or sick times.

Certainly the start and end date can also be the same.

Create time entry array

A time entry array consists of time entries that repeat over the given time frame.

In opposite to the several days' duration entries, a concrete start and end-time must be set.

Special case: employee starts in mid-month

TimePunch always takes the complete month in order to calculate the flexitime. If therefore an employee starts in mid-month the working time until the current start day has to be marked as "idle-period". This is necessary because otherwise the missing entries will be calculated as missing hours.

In order to create an idle-period one can create a new time-entry series. The default project "other" contains a task called "idle-period".
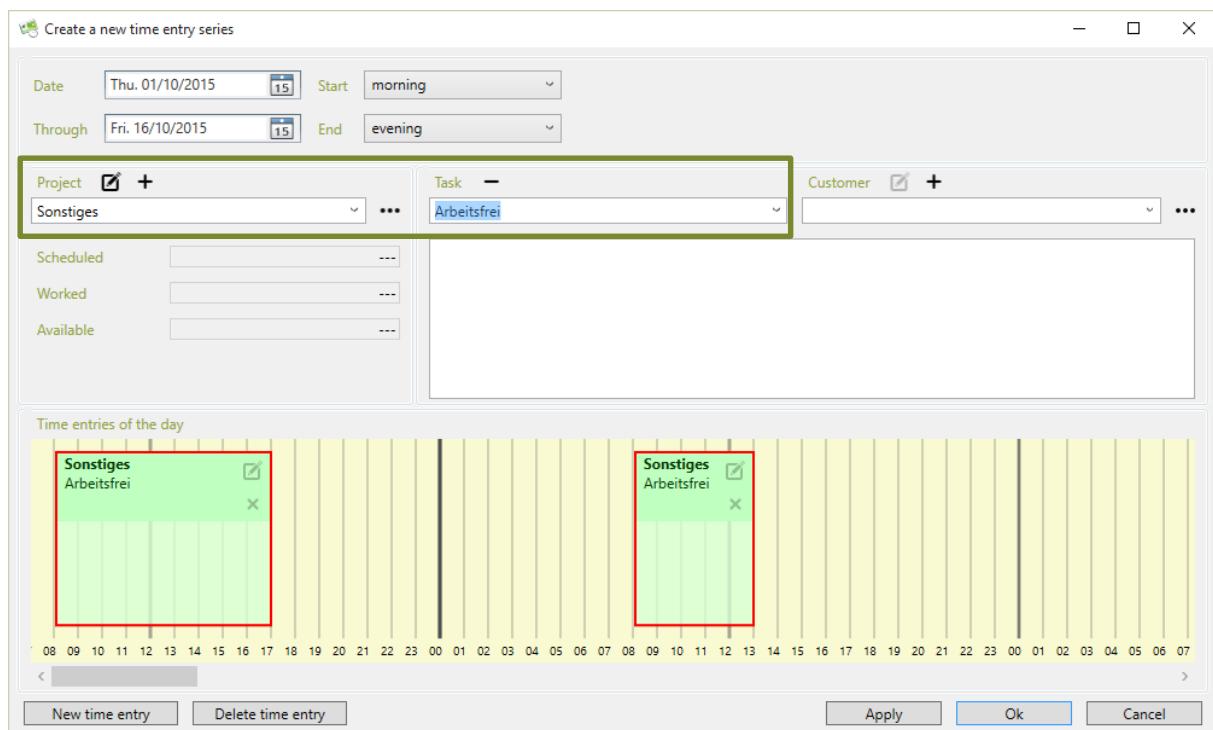
Additional special-cases that need manual entries

Manual entries (e.g. entries that cannot automatically recorded by the TimePunch Watcher or the RFID employee ID card) must be created for the following situations. Those entries must be entered by the staff member himself (if he/she has the proper permissions) or by the personnel-office.

Special-case	Description
idle period	Used mainly to define the time frame from beginning of the month until the beginning of an employee's work. If those entries are missing, the time will be recorded as absence time for the employee.
annual plant shutdown	The annual plant shutdown does not reduce the annual leave of the employee.
driving time	The driving time can be added to the working time depending on the employees TimePunch Profile. Without changing the profile the driving time will be summed up at its own.
sick	You can record the illness-related absenteeism with this type of entry.
overtime compensation	This entry is used to reduce overtime by holiday. With the help of this type of entry, the planned overtime can be logged.
leave	Holiday bookings will reduce the annual leave of the employee.

More entry types can be freely defined in the project dialog at "Master data / projects / other" with the help of the tasks.
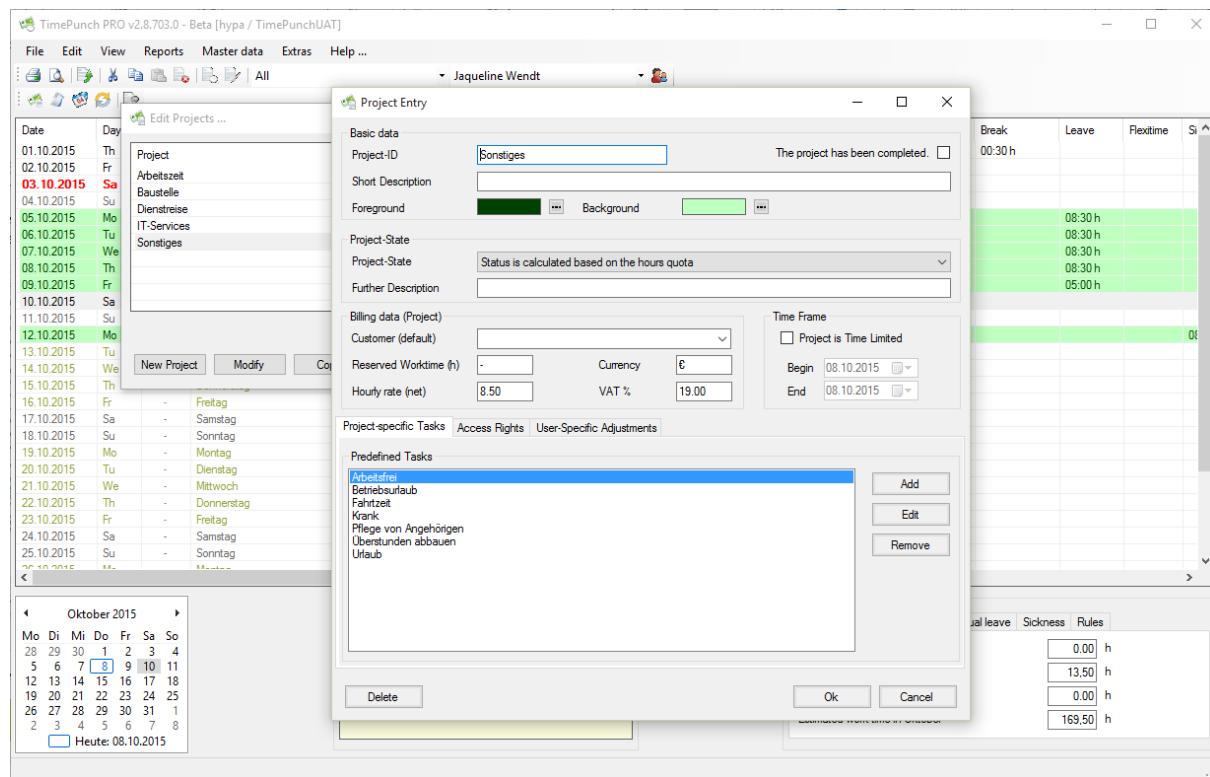
It is important when editing an activity that the booking type is selected correctly.

Booking Type	Description
Working time	The entry is counted as working time.
Driving time	The entry is counted as travel time. The travel time may be applied to a previously defined percentage as working time.
Leave	The entry will be counted as a holiday.
Sickness	The entry will be counted as a sickness.
Overtime compensation	The entry reduces the balance of the overtime. Important! Also missing entries reduce the balance of the overtime. Even if it is technically not necessary to book the overtime compensation, it should be booked yet for reasons of traceability.
Special leave, Bank holiday, Annual Closing	Special leave reduce planned working time, but do not count on the holiday account. Generally accepted special leaves are E.g. moving, wedding, etc.

Time sheets

The time sheet can be printed out in two versions. The standard version with all columns used to print out at a Din A4 paper in landscape mode. And a short version that only contains the most important columns. This version is optimized for print out at Din A4 paper in portrait mode.

Projects and tasks

In TimePunch time entries can be applied to a project and a task. The following pages describes how to manage those in TimePunch.

Creating projects and edit

Using the menu item "Master data / projects" all defined projects will be shown. Inactive projects will be hidden by default, but can be shown by deactivating the checkbox "Only show active projects".

Project	Begin	End	
Arbeitszeit	---	---	
Baustelle	---	---	
Dienstreise	---	---	
IT-Services	---	---	
Sonstiges	---	---	

Only show active projects ☑

New Project | Modify | Copy | De-Activate | Ok
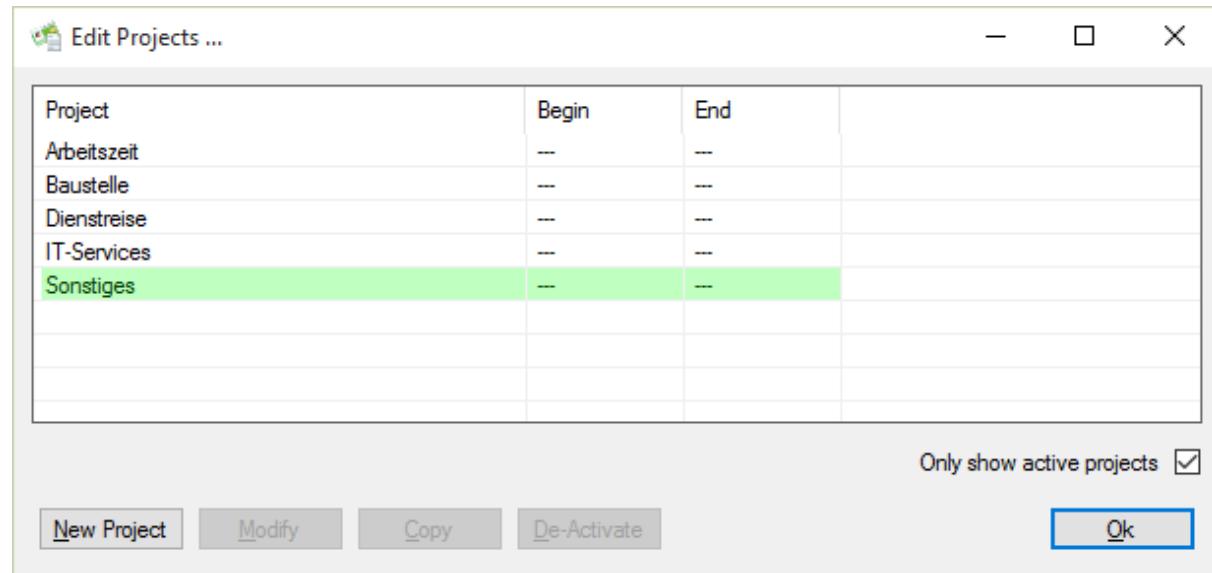
At this dialog new projects can be created and existing projects can be edited with a double click.

The project dialog

After creating the project, a dialog opens the edit of a project.
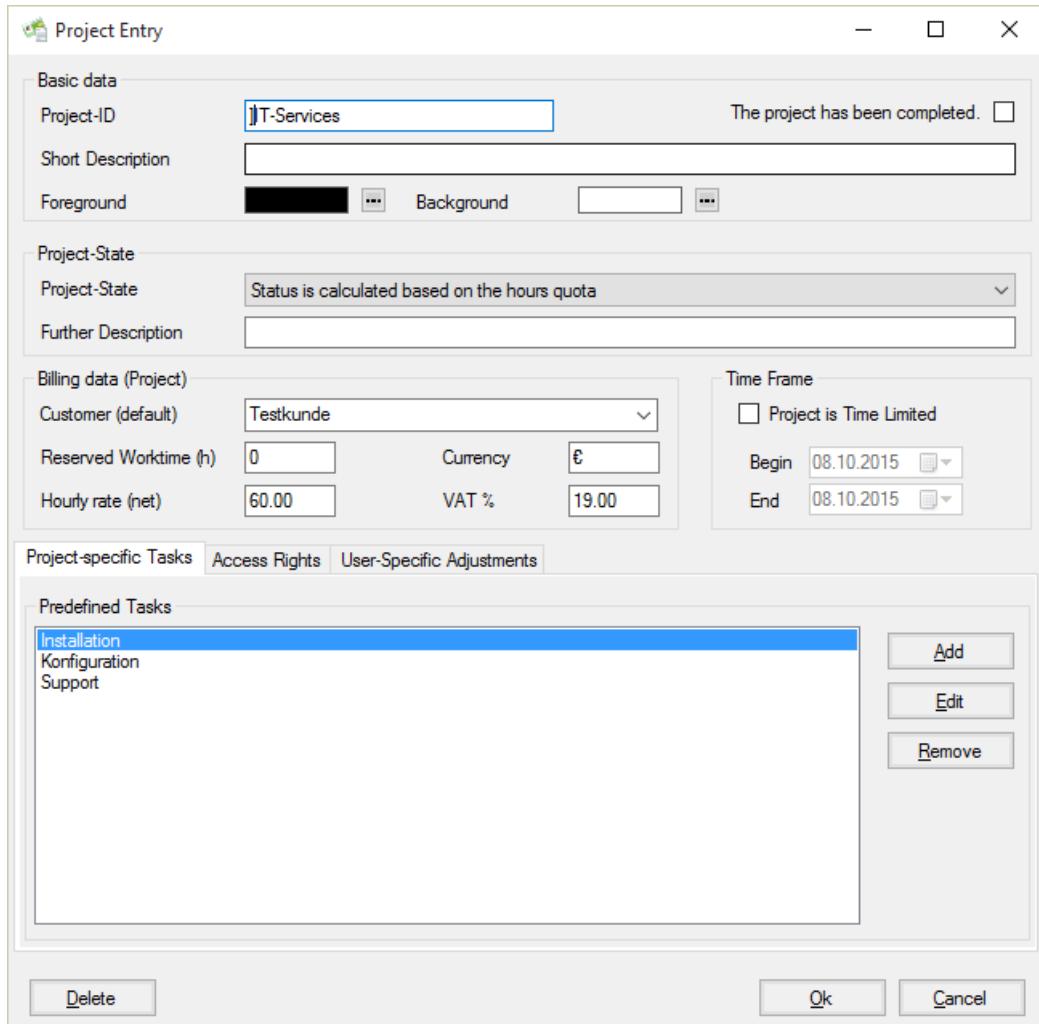
At this dialog project specific tasks can be created by using the "add" button.

Access rights and user specific adjustments

In order to keep the project list for the single project member clean, the access rights for projects can be handled at user level.

The same is also true for user specific adjustments. At this page the hourly work rate and the maximum amount of project hours per member can be defined.

Project Budgets

For every project it's possible to define its own project budget within TimePunch. This defines the work time budget for the project pool and/or the single staff member.

Project pool

The project pool contains all staff members that are allowed to book on the project and which do not own an exclusive work time budget. That are all members for whom no time budget has been defined.

The work time budget that can be defined at the project dialog directly, is the maximum work time for the project pool. By default all employees share the same project budget.

Staff members

The work time budget for a single staff member can be defined at user specific adjustments. This work time budget is assigned to the staff member exclusively and can only be used by him or herself.

Total budget

The total project budget is the combined project pool budget plus the work time of the staff members.

Project overview

The projects are evaluated on the report "Project overview" and "Project report". The project overview provides the status of all projects, the total number of hours, as well as an overview of the remaining hours of the project.
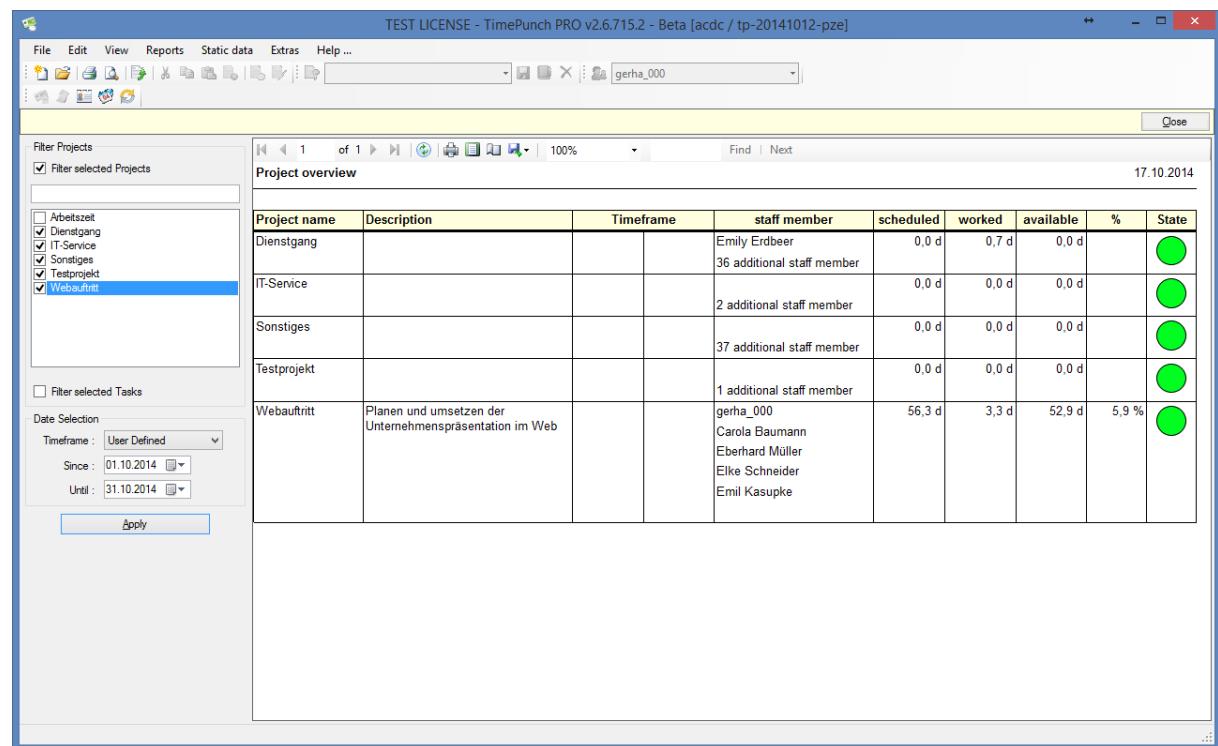
Project name	Description	Timeframe	staff member	scheduled	worked	available	%	State
Dienstgang			Emily Erdbeer 36 additional staff member	0,0 d	0,7 d	0,0 d		🟢
IT-Service			2 additional staff member	0,0 d	0,0 d	0,0 d		🟢
Sonstiges			37 additional staff member	0,0 d	0,0 d	0,0 d		🟢
Testprojekt			1 additional staff member	0,0 d	0,0 d	0,0 d		🟢
Webauftritt	Planen und umsetzen der Unternehmenspräsentation im Web		gerha_000 Carola Baumann Eberhard Müller Elke Schneider Emil Kasupke	56,3 d	3,3 d	52,9 d	5,9 %	🟢

A detailed report of all total hours and the hours worked during the reporting period are offered by the project report.

A very strong feature is the point "Important points in the reporting period". Here everyone simply can mark a time entry as important and thus is pinning the point on the project report.

Common Tasks

If tasks are used in every project, they can be treated as common tasks in TimePunch. Those tasks are useable in every project and therefore need not be created as a new task within the project.

Using the menu "Master data / Common Tasks" the following dialog will be shown.
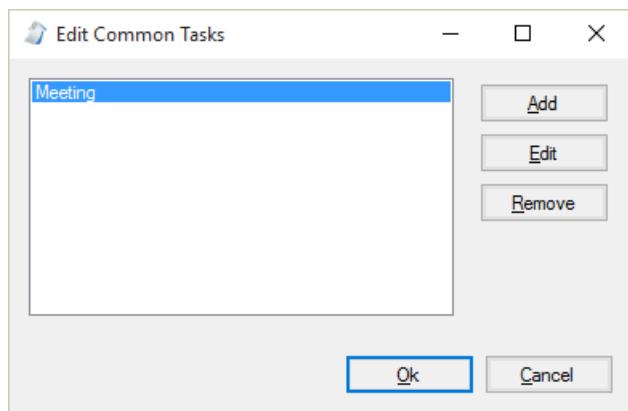
Detailed Project Accounting

The report "Detailed Project Accounting" has been designed as a special report for users who need to show the project hours to their customer. The report can be accessed in menu "Reports".´

Reporting Data

Project:	IT-Service	Date:	12/02/2014
Profile:	Carola Baumann	Timeframe:	03/02/2014 to 14/02/2014
Hourly Rate:	58.00 €	Vat:	19.00 %

Date	Day	Task	Start	End	Work	Net Amount	Gross Amount
03/02/2014	Mon	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
04/02/2014	Tue	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
05/02/2014	Wed	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
06/02/2014	Thu	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
07/02/2014	Fri	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
10/02/2014	Mon	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
11/02/2014	Tue	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
12/02/2014	Wed	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
13/02/2014	Thu	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
14/02/2014	Fri	Support	08:00	16:00	08:00	464.0000 €	552.1600 €
Summary					80.00	4,640.00 €	5,521.60 €

Signature

Project calculation

For helping the project office we developed the report 'Project accounting' and 'Project accounting per User'. Using this reports; one can evaluate how many hours in total have been booked for a project.


In order to show the complete project times, the following settings need to be set up.

- No staff member must be selected. The easiest way to achieve that is to hit the button "All staff members".
- The Date Selection should be set to "All Time Entries" in order to get all project bookings that have been made so far.

Customer management

TimePunch provides the ability to assign time entries to different customers. This allows a customized accounting of hours worked.

Therefor it`s necessary to store the customer data in TimePunch. The customer data is maintained via the menu "Master data / customer".
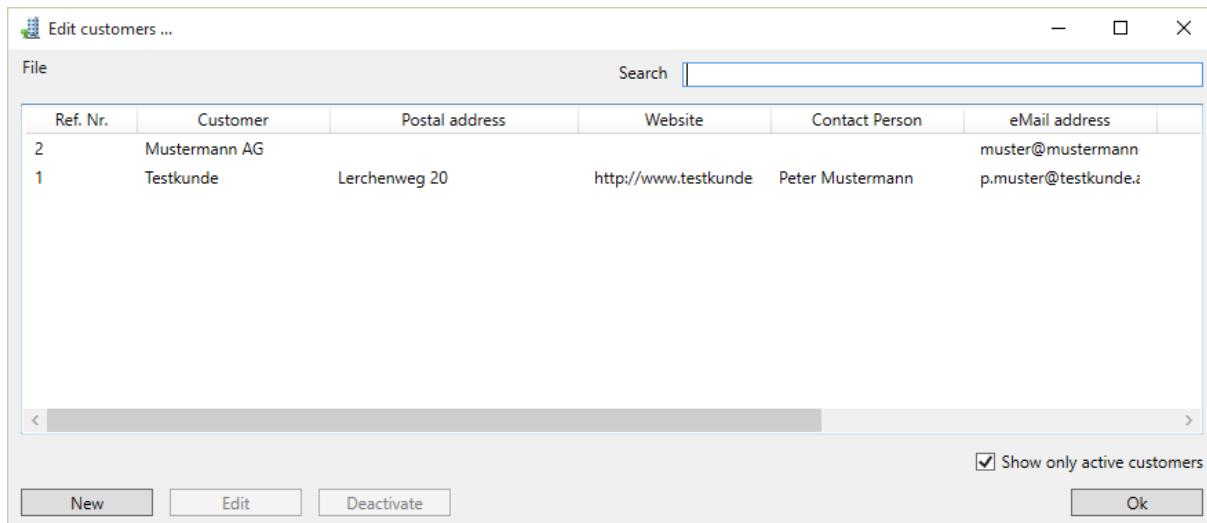
Import and export customer data

Within the master data the customer can be imported and exported by using the menu called "File".

This happens mainly by importing and exporting CSV files. For the import it will be supposed that the first row contains the column title. The title defines the content of the column. The column order and completeness is not important as long the both mandatory fields "Ref. Nr." and "Customer" are filled.

Hint: The easiest way to create an import template is to export a set of test data using "file / customers export" and save as CSV file.

Manually create and edit customer data

Within the master data the customer data can be created with "New" and amended with the "Edit" button.

Both will open the following dialog where the customer data can be entered manually.


The mandatory fields "Ref. Nr." and "Customer" must be filled at least in order to store the customer.

Assign time entries to a customer

There are various ways to assign time entries to a customer.

Assign a customer when editing a time entry

Within the edit dialog of a time entry, a customer can be assigned to the time entry.
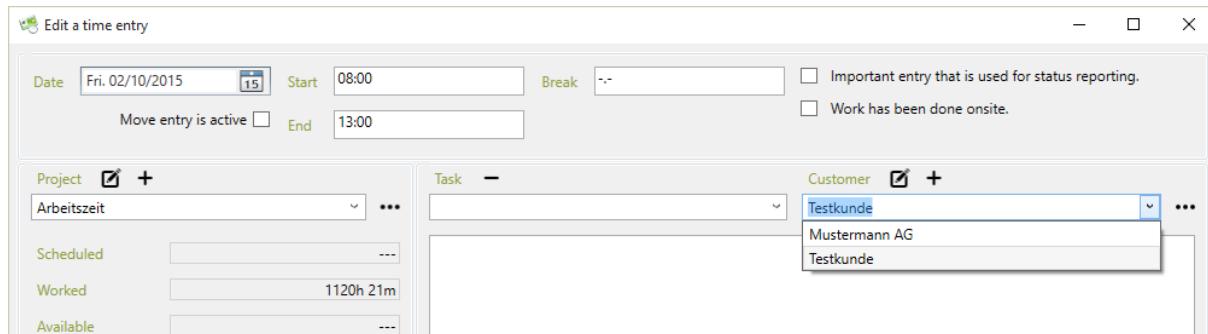
Assign a customer to multiple time entries

To assign a customer to multiple entries, those entries must be marked in TimePunch. Then the customer can be assigned by choosing "Assign to customer" in the context menu.
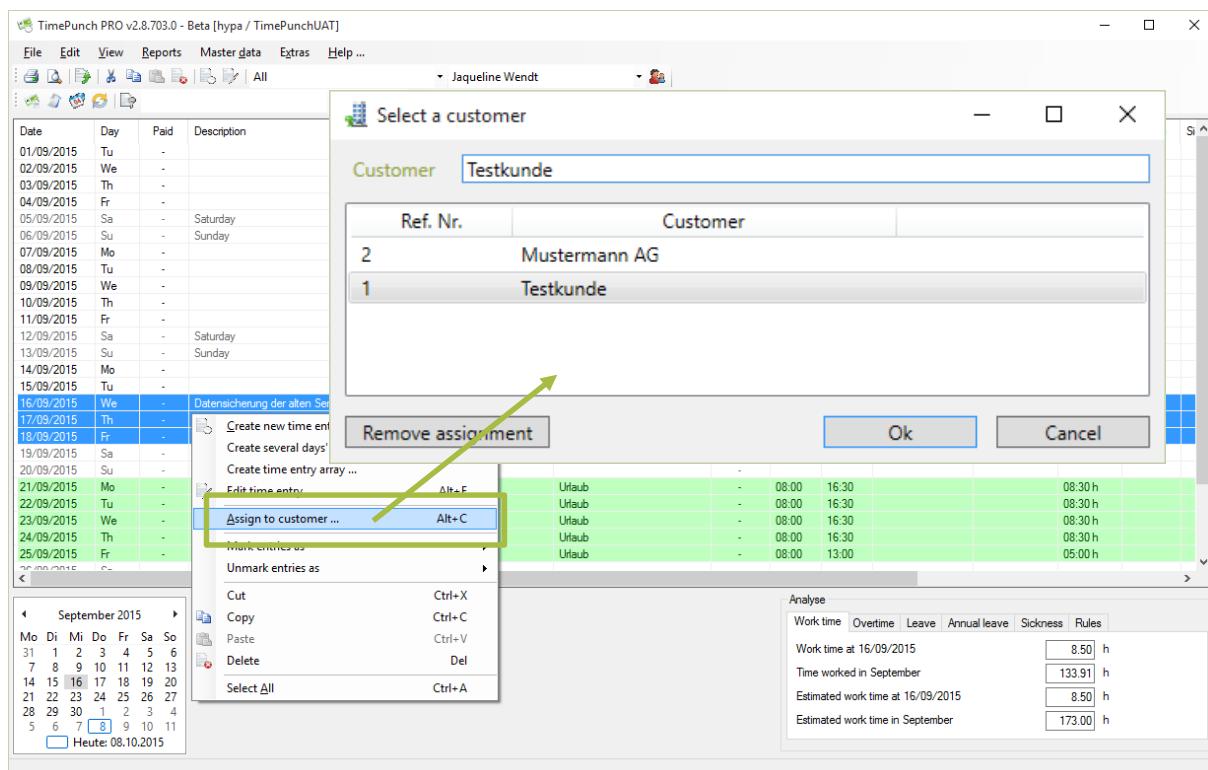
Directly assign a customer to a project

In addition to the possible assignment of a customer after recording the time entry, a customer can also be assigned to a project directly in forehand.

This can be handled in the dialog to edit project (see project management)
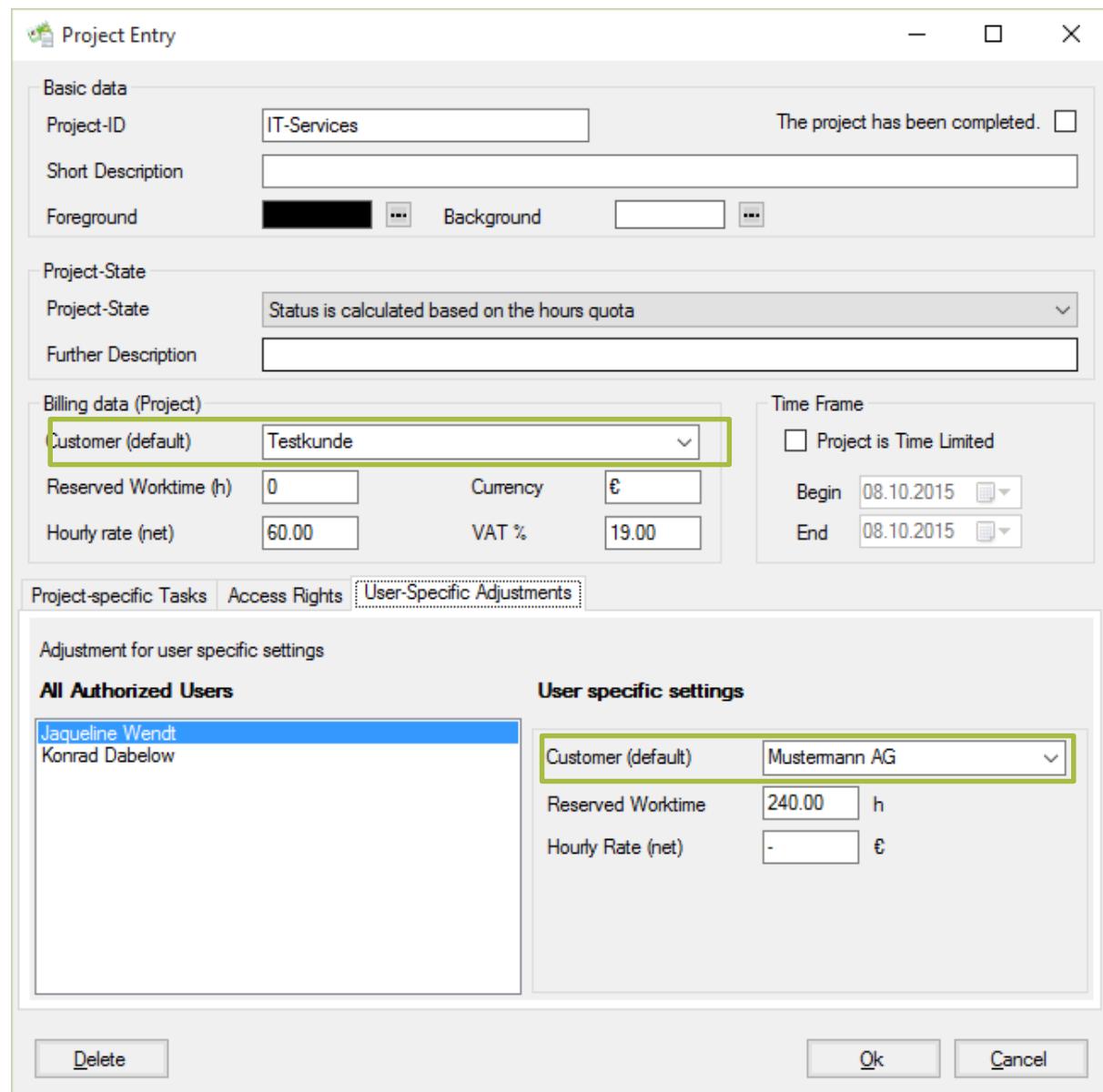
This mapping can be adjusted later. However, it serves by default for new time entries.

Flexi time calculation

At the following pages the flexitime calculation will be described. Also it will be shown how the calculation can be corrected, if needed.

Showing the current month data

In the current month, the working time, the overtime and the remaining leave will be shown in a separate information window. This window is placed in the middle of the TimePunch Window at the lower border.

The working time will be displayed up to the current date. That is also true for the cumulated overtime. It's important to know that the displayed overtime includes the working time of the current day.

Analyzing the overtime in the current month

The overtime per user can be displayed in the analyze window (lower right). At this place the overtime at the beginning of the month, the overtime within the month and the overtime at the end of the month will be displayed.

If a correction took place in form of overtime payment or overtime restriction, the original overtime and also the corrected overtime will be displayed.

Manage the flexi time account

Additionally to the applied overtime rules of the given user Profile can be amended in every month separately. Using the button "extended" the overtime can be amended.

Overtime compensation with the working time contract

If the employment contract contains an overtime compensation, it can be defined by each month separately.
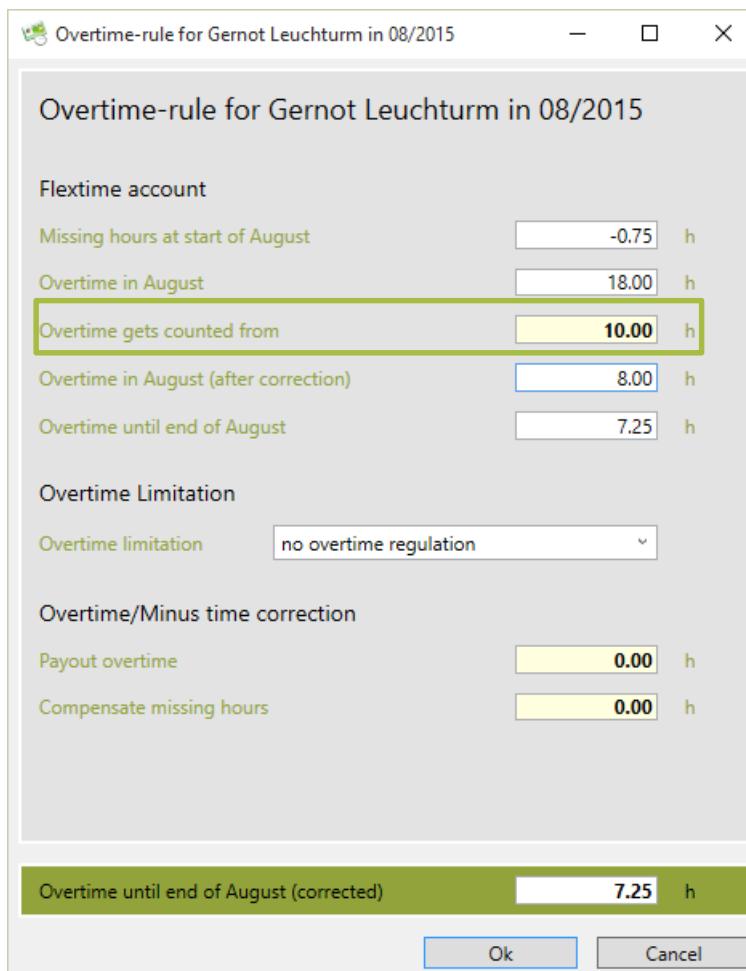
An overtime compensation means that the overtime is counted only from a certain number of hours as overtime work. Below this threshold, the overtime is compensated by the employment contract.

Overtime limitation

In order to set an overtime limit, at the selection list "overtime limitation" the corresponding list entry needs to be chosen.


On request, the overtime can be limited per month or a total. This can be done with the second selection:

"Regulate accumulated overtimes" means that the employee can only have a limited overtime in total.

"Regulate monthly times only" means that the employee can only have a limited amount of overtime in month, but in total unlimited.

Overtime gets paid automatically

Overtime can be paid automatically, if overtime exceeds the set maximum number of overtime. This is to select the checkbox of the entry "Overtime above the limit will be paid automatically".
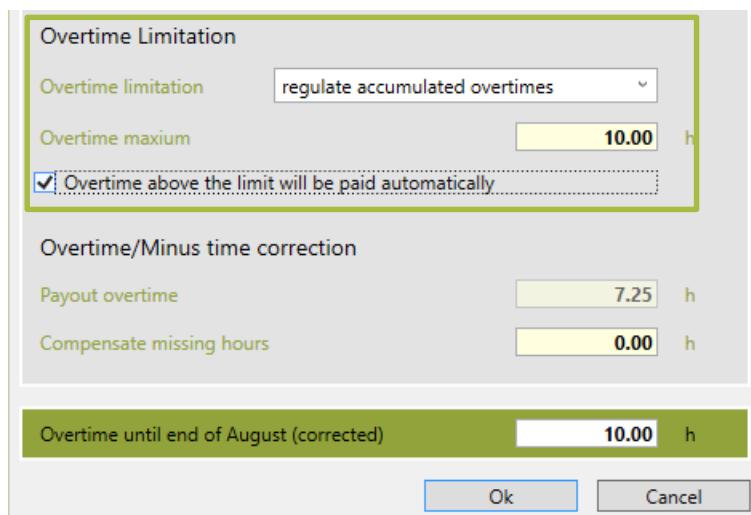

Important: Overtime can only paid out automatically, if an overtime limitation has been set in order to calculate the difference to it.

Pay-out overtime once and manually

Overtime can be paid out manually, by entering the overtime to be paid out in the field "Payout overtime". Similarly for compensating missing hours. One only has to enter the missing hours to compensate into the corresponding field.
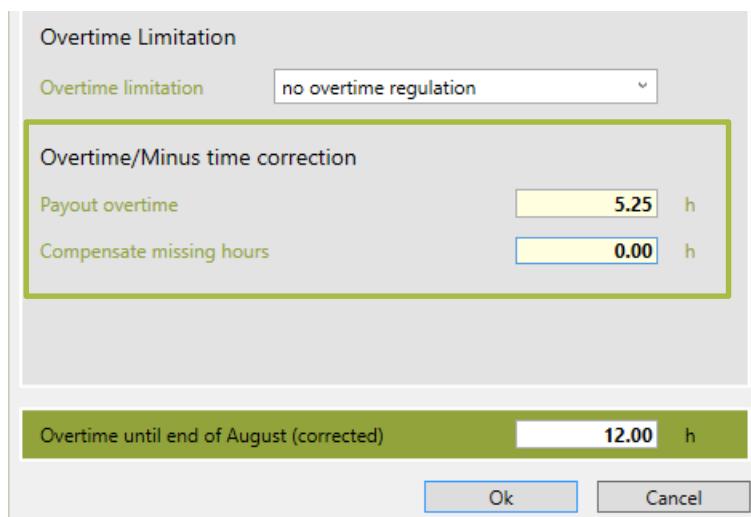
Overtime compensation

The flexi time calculation in TimePunch interprets missing entries as taken-overtime. Seeing that adding an entry for overtime compensation is not necessary.

But for the clarity, adding entries for the compensated overtime is a good advice. Also in this case it's recommended to create an entry series.
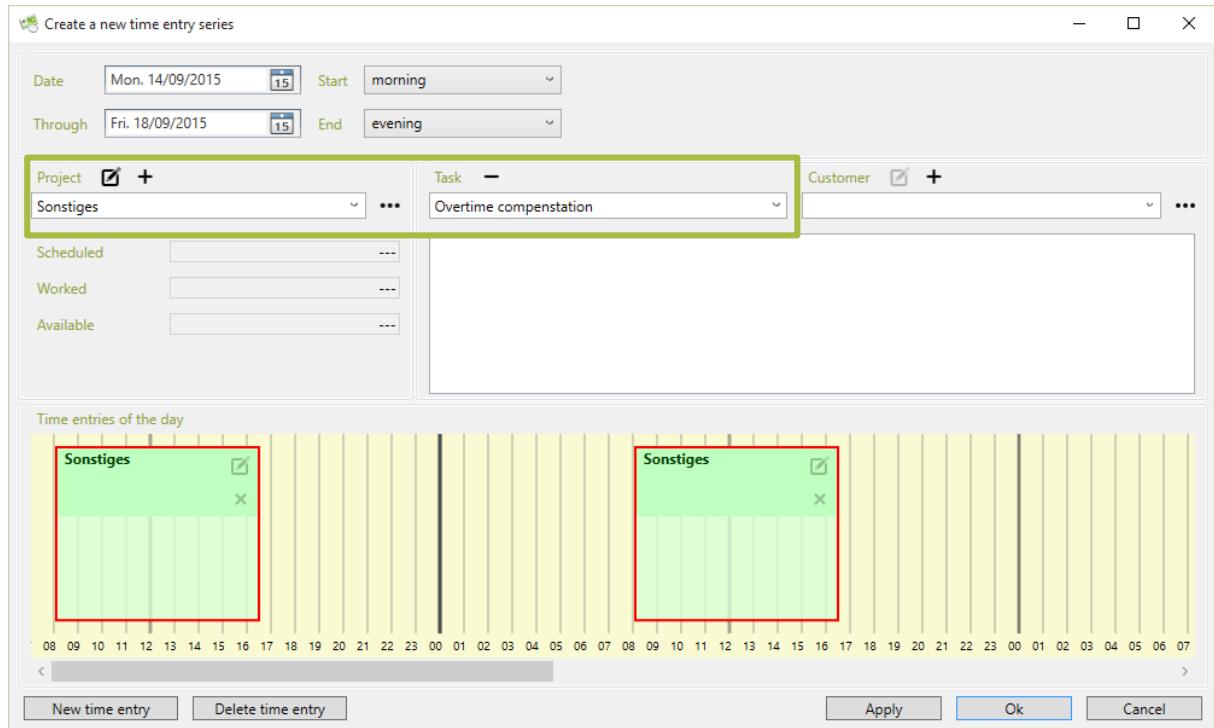
Evaluate the development of overtime

The buildup and reduction of overtime can be evaluated at best with the overtime report. In this report the target hours, the current working time and the therefore done and taken overtime displayed.

Overtime report for Jaqueline Wendt 3/2015   06/04/2015

Overtime	+	3:10 h		
Overtime starts at		0:00 h		
Overtime (corrected)	+	3:10 h		
Paid overtime	-	3:00 h		
Missing hour compensation	+	---	Overtime limitation	no regulation
Remaining overtime	+	0:10 h	Overtime maximum	---
Overtime previous month	+	2:30 h	**Total overtime**	+ **2:40 h**

Date	Day	Estimated	Sick	Leave	Work	Break	Overtime	Taken Overt.	Current Overtime
01/03/2015	Sun								2:30
02/03/2015	Mon	8:00			8:20	0:40	0:20		2:50
03/03/2015	Tue	8:30			8:25	0:30		0:04	2:45
04/03/2015	Wed	8:30			9:00	0:30	0:30		3:15
05/03/2015	Thu	8:30			8:30	0:30			3:15
06/03/2015	Fri	6:00			6:00	0:30			3:15
07/03/2015	Sat								3:15
08/03/2015	Sun								3:15
09/03/2015	Mon	8:00			8:30	0:30	0:30		3:45
10/03/2015	Tue	8:30			8:30	0:30			3:45
11/03/2015	Wed	8:30			8:50	0:30	0:20		4:05
12/03/2015	Thu	8:30			8:30	0:30			4:05
13/03/2015	Fri	6:00			6:00	0:30			4:05
14/03/2015	Sat								4:05
15/03/2015	Sun								4:05
16/03/2015	Mon	8:00			8:35	0:35	0:35		4:40
17/03/2015	Tue	8:30			8:30	0:30			4:40
18/03/2015	Wed	8:30			8:30	0:30			4:40
19/03/2015	Thu	8:30			8:30	0:30			4:40
20/03/2015	Fri	6:00			6:00	0:30			4:40
21/03/2015	Sat								4:40
22/03/2015	Sun								4:40
23/03/2015	Mon	8:00		8:30	---		0:30		5:10
24/03/2015	Tue	8:30		8:30	---				5:10

Annual leave management

The following pages describes how the annual leave can be managed and evaluated using TimePunch.

Set-up the leave account for the first time

If one create a new TimePunch profile for a new member, the annual leave (as defined in the contract) must be entered in TimePunch.
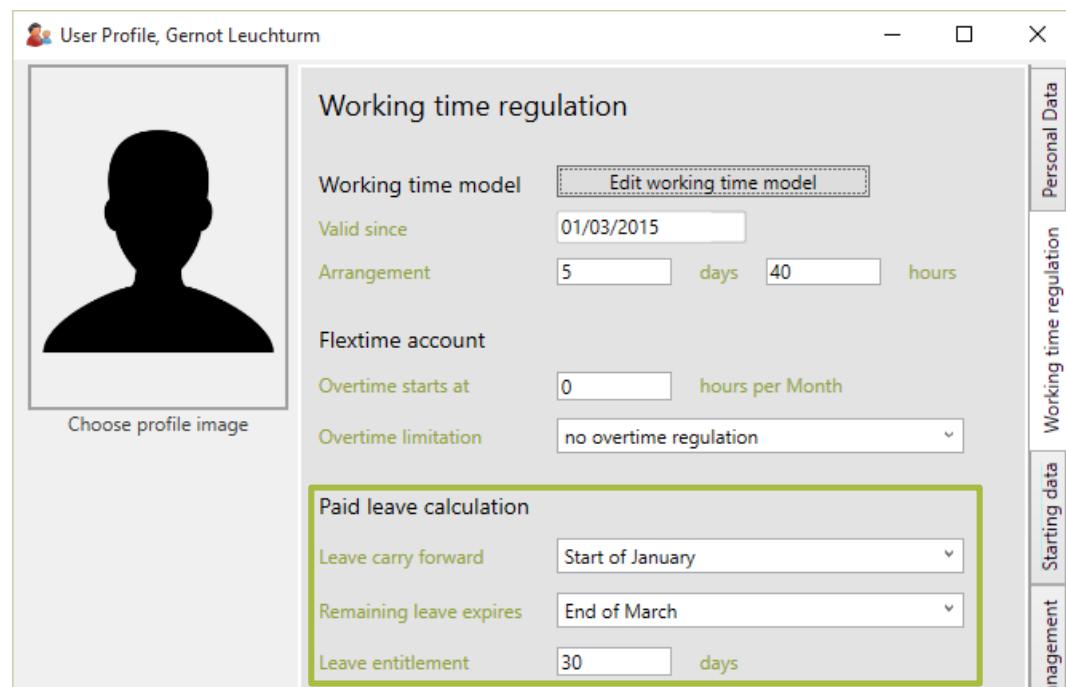
If the employee starts in the mid of the year, the remaining-leave must be entered at the starting-data section.

The same also applies to the introduction of TimePunch. At the "starting data" section the amount of holidays should be entered, which the user has available at the start of using TimePunch.
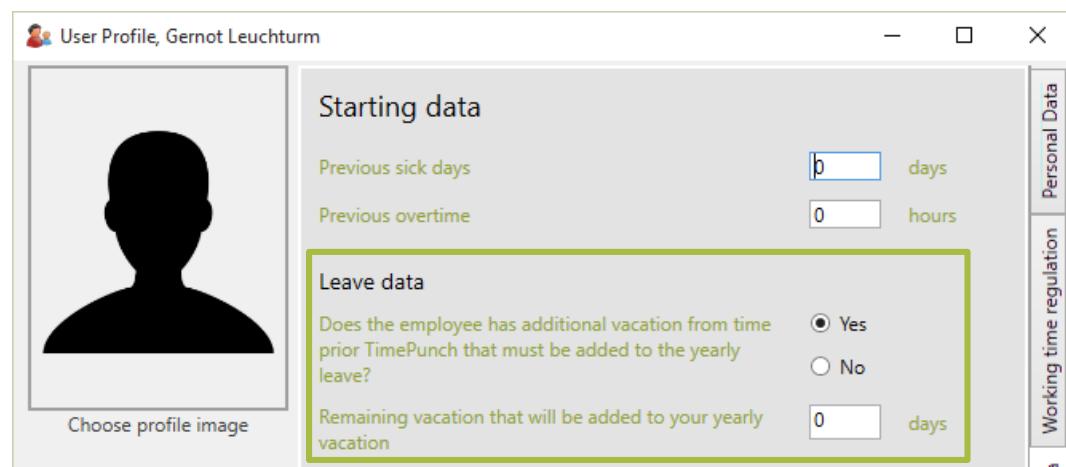
How to enter annual leave

In order to enter annual leave, choose 'Edit, Create several days' duration entries …' from the menu. Now select the task "Leave" that is a default in the project named "Others".

The fields 'start' and 'end' specify the day time where the entry starts and ends. The concrete start and end times will be taken from the working time model.
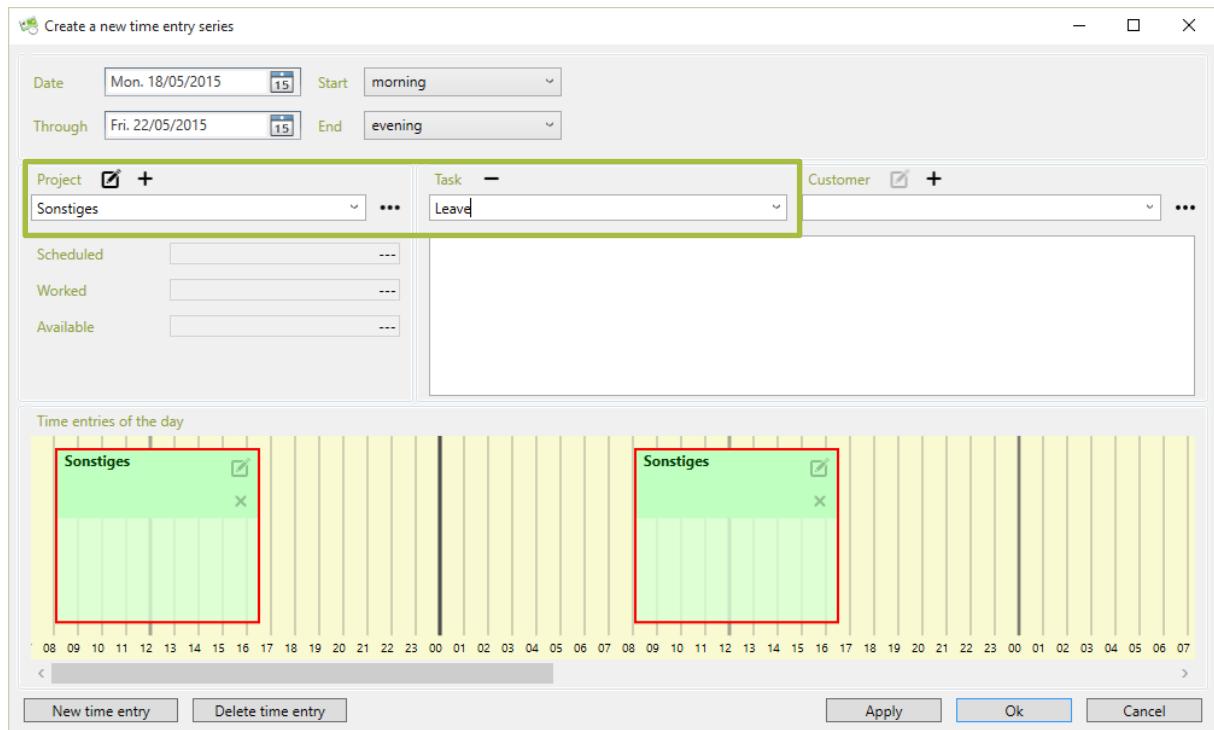
Holiday planning

TimePunch offers the "Holiday planning" report for the easy planning of annual leave. In this report, each employee can see the registered holiday times and print it out. Overlapping times are directly visible and can be corrected.
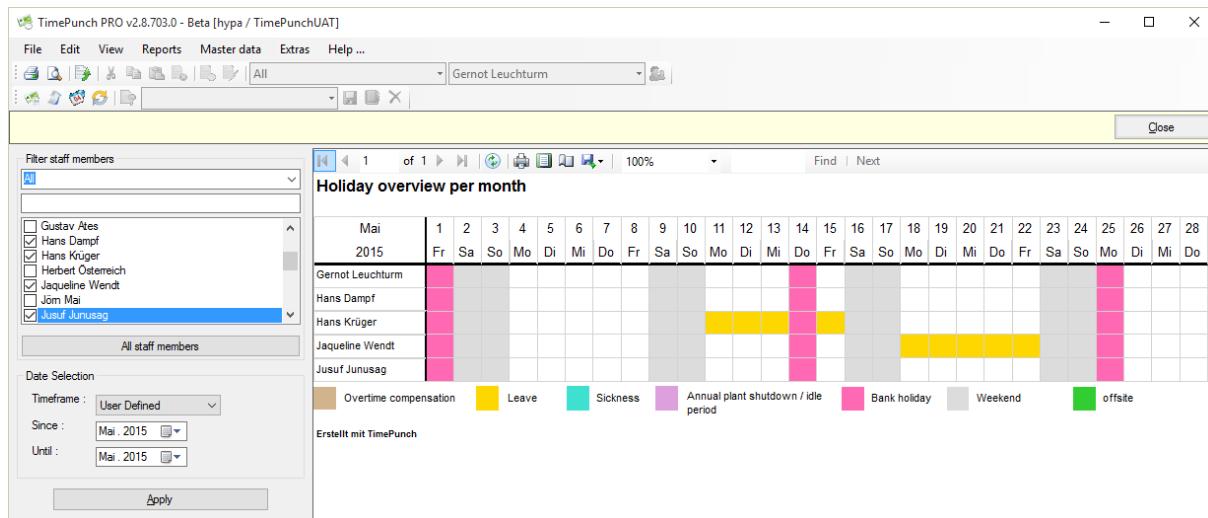
## Take remaining leave into the upcoming year

The remaining holiday is automatically transferred into the New Year. Therefore the last month before the month, which was designated as vacation carryover in the profile, is crucial.

The current holiday annual leave can be viewed in the register.

By using the button "Extended" the annual leave can be adjusted for the accounting year.
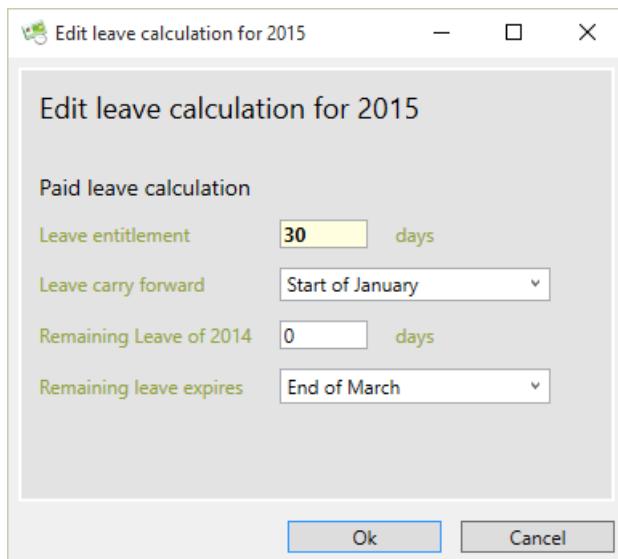
For the current booking year, the month that shall be used to carryover the holiday, can be set. Additionally the yearly amount of leave can be entered.

If remaining days from the previous year are taken over, it is possible to set an expiration date. The expiration date defines until when the vacation of the previous year must be taken. If the staff does not take the remaining leave until this expiration date, it expires. Then the staff member only owns the annual leave of the current accounting year.

Teams, Departments and Branches

For a better clarity and staff management, the employees can be grouped in TimePunch. Therefore three layers of groups are supported. That are teams, departments and branches.

Each Group (e.g. team, department and branch) must have a group leader. The group leader owns independent from their actual permission the right to access the working time reports of their group members. That means a read only access to the working times of the members is always given.
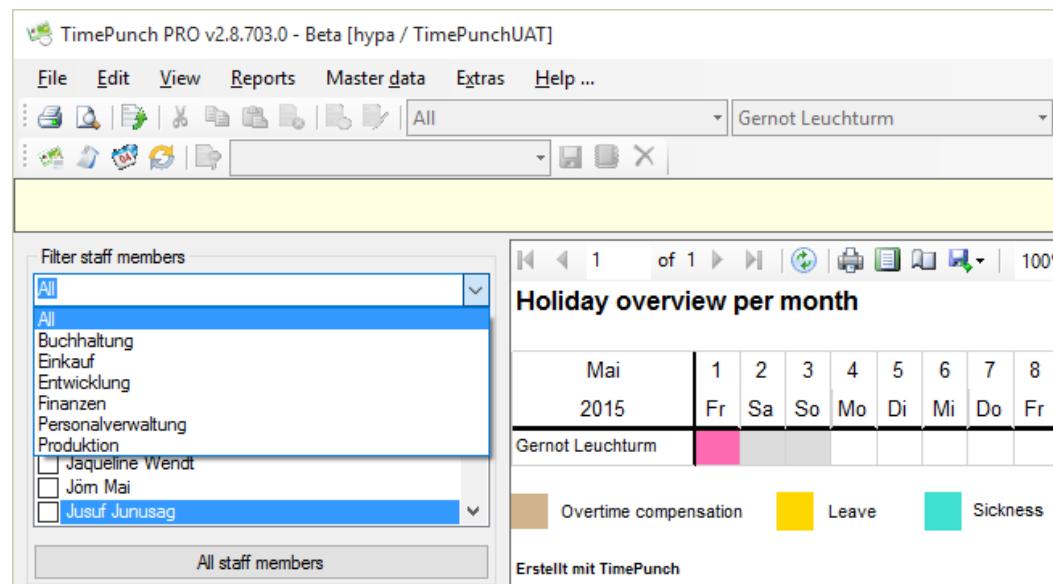

Additionally the group leader and their assistants can be set the Authorization for Human Resource Management.
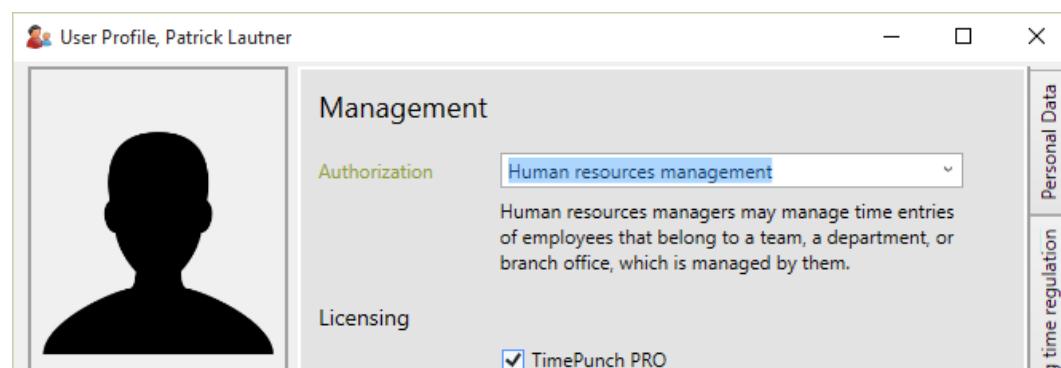
In this case the group leader or their assistants have the right to manage the working times of the group members.

The groups that the group leader can access, are displayed beside the staff member selection in TimePunch.


Manually create and edit groups

Teams, departments and branches are managed at the menu "master data" in TimePunch. Only the administrator of TimePunch can manage groups, add and remove group members.
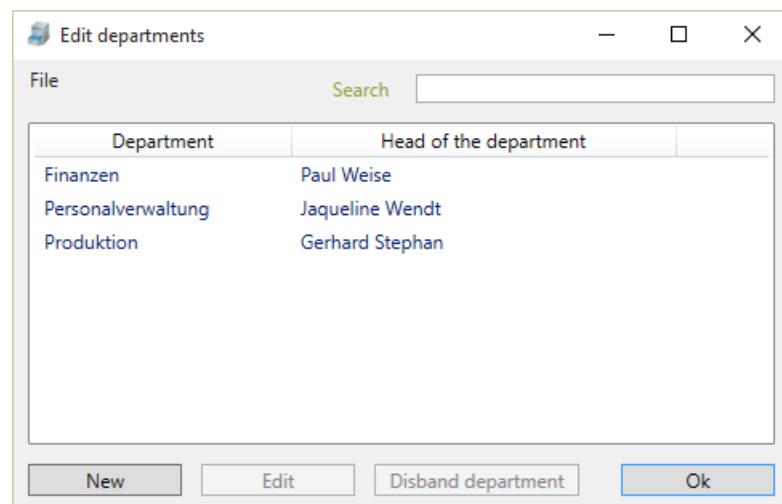
A new group can be added with click at the button "new"
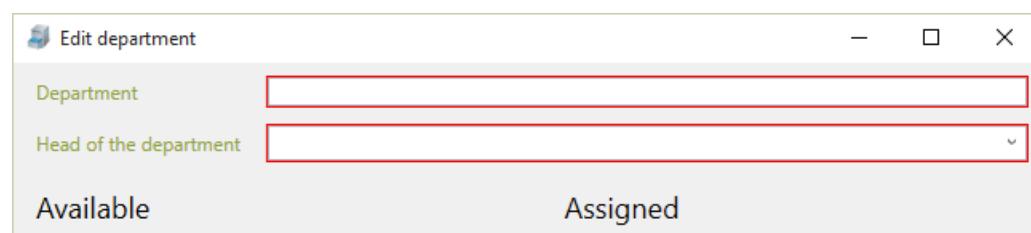
For each group a name and the group leader (at this place head of the department) need to be defined. Furthermore group members can be assigned as assistants of the group leader.

Important: The group leader don't need to be a member of the group, but the selected assistants need to be. So it can be secured, that one staff member can own the leadership of distinct groups.

The group leader always owns the right to display the working time reports of the group members. But only with the authorization "Human resource management" the working times of the group members can be changed by the group leader.

By using the menu "master data" and the sub items teams, departments and branches the group list gets opened. With a click to the button "Edit" the group assignment can be edited.
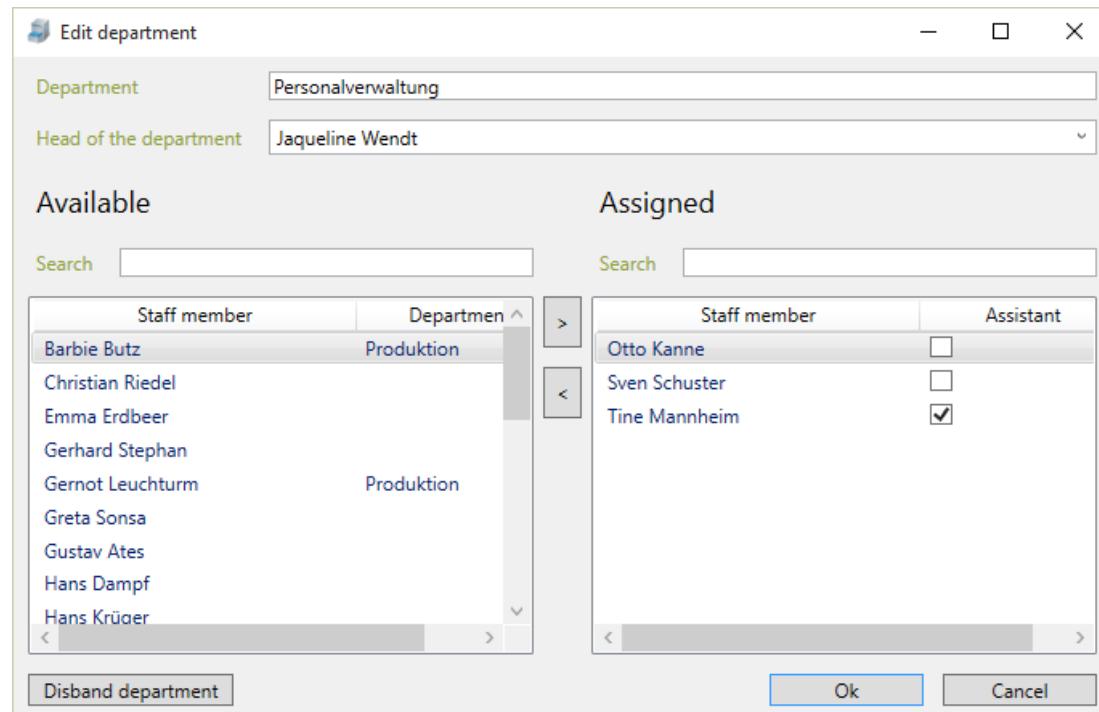
It's important to know that in one group layer a staff member can only assigned to one specific group. Each staff member can be assigned to one team, one department and one branch.

## Import and export group assignments

Within the master data the group assignments can be imported and exported by using the menu called "File".

This happens mainly by importing and exporting CSV files. For the import it will be supposed that the first row contains the column title. The title defines the content of the column. The column order and completeness is not important as long the both mandatory fields "Name" and "Staff member" are filled.

Hint: The easiest way to create an import template is to export a set of test data using "file / export department assignments" and save as CSV file.

Assign staff member profiles directly to a group

At the TimePunch profile dialog, the employee can be assigned directly the respective team, the department and the branch. This is easier in many cases because the employee can be managed holistically.
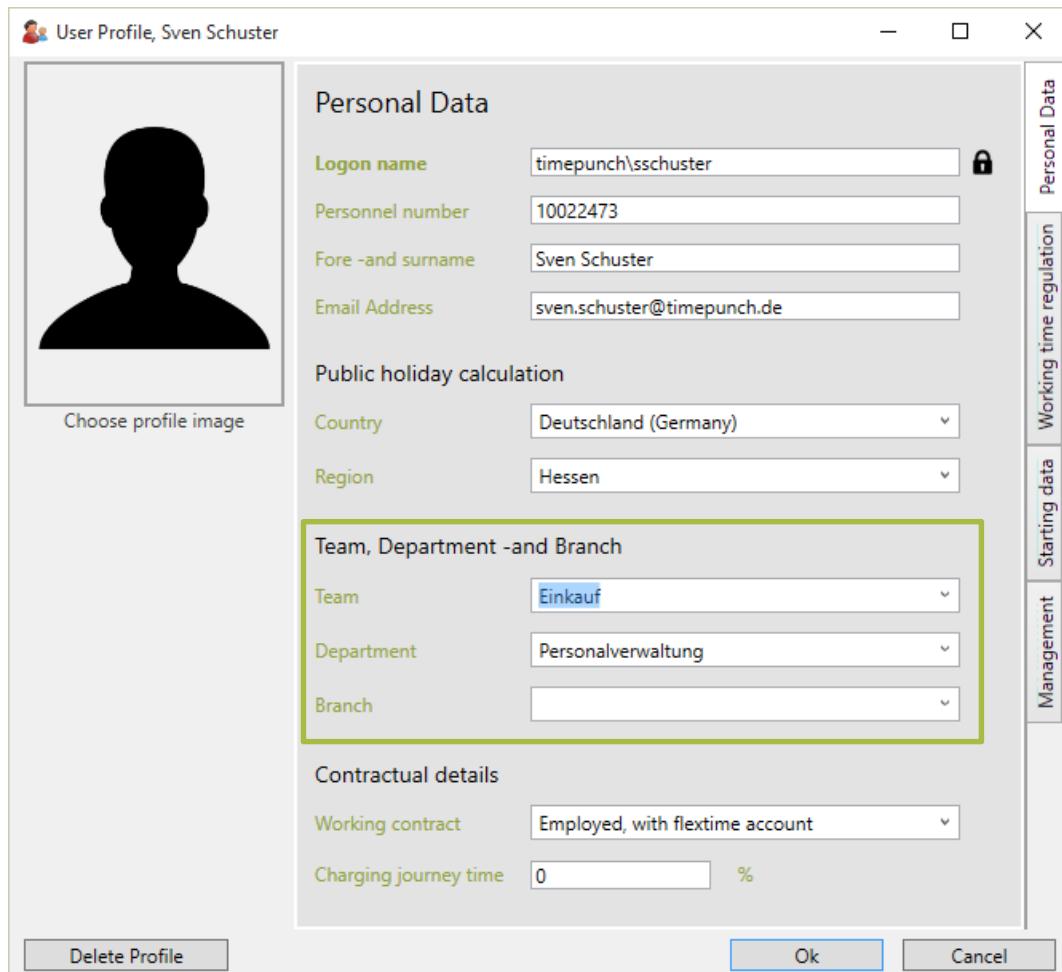
Reporting

The following pages describe the reporting functionality of TimePunch.

Menu „Reports", Reporting Options

For each report there are different filters available. This filters won't change the look, but the data that is displayed.

If the account owns administration rights, it is possible to create reports for all user accounts. For most reports it's also possible to filter projects and tasks, as well as the reporting time frame.

Additionally there is an option called "Payment Selection" with that only paid entries or non-paid entries can be filtered.

After applying the settings the report will be recreated by using the new filter settings.
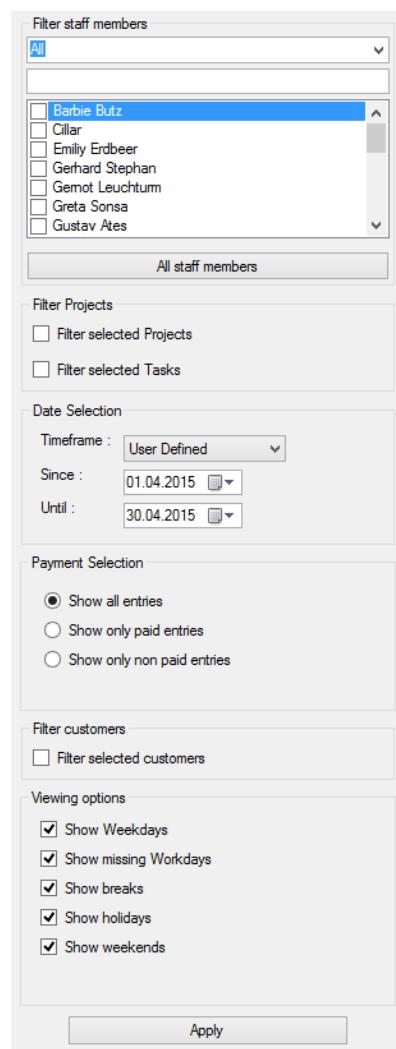
Report export

Each report can be exported as an Excel, PDF or Word file.

Microsoft Excel has been established as a standard export. Therefore there's an direct export for excel implemented in TimePunch, with that the report gets directly opened within a new Instance of Microsoft Excel.
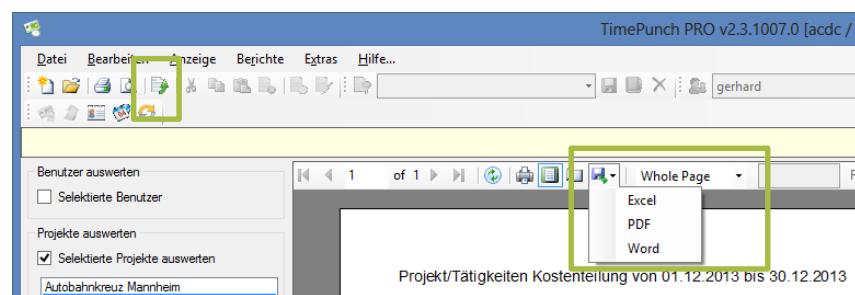
Permission management

The following pages describe the permission management in TimePunch PRO.

Permissions

As a standard every installation owns administration rights. If TimePunch gets installed in an enterprise environment, each user can be assigned to a different role. The role defines the permissions that the user owns.

Login Permissions	Administra-tion	Human Resource manage-ment	Project-Manage-ment	Staff member in position of trust	Staff member
Login	x	x	x	x	x
Manage TimePunch Profiles (switch users)	x	x			
Administrative Tasks	x				
Synchronisation					
Access to the Synchronization Wizard of TimePunch	x	x	x	x	
Time recording					
Access to the TimePunch Watcher	x	x	x	x	x
Change active time entry	x	x	x	x	
Change recording settings	x	x	x	x	
Project access					
Access to the active projects	x	x	x	x	x
Managing the projects	x	x	x		

	Col1	Col2	Col3	Col4	Col5
Send projects using the TimePunch Sync Wizard	x	x	x	x	
Receive projects via TimePunch Sync Wizard	x	x	x		
Access project reports	x	x	x		
Access financial details	x	x			
Common Task access					
Access to the active tasks	x	x	x	x	x
Managing the common tasks	x	x	x		
Time entries					
Access to the time entries	x	x	x	x	x
Modify existing time entries	x	x	x	x	
Send time entries using the TimePunch Sync Wizard	x	x	x	x	
Receive time entries using the TimePunch Sync Wizard	x	x	x	x [1]	
Restricted modification of existing time entries.					x
Flexi time / Annual leave					
Manage flexi time and annual leave	x	x	x	x	x
Report flexi time account	x	x			
Display monthly flexi time	x	x	x	x	x

[1] Sofern dabei keine Projekte oder Tätigkeiten verändert oder angelegt werden.

Manage monthly flexi time	x	x	x		

Working time models					
Display working time models	x	x	x	x	x
Manage working time models	x	x			

Month-end closing					
Display month-end closing	x	x	x	x	x
Do month-end closing	x	x	x	x	x
Revert month-end closing	x	x			

Customer management					
Access customer data	x	x	x	x	x
Manage customer data	x	x	x	x	x
Export customer data	x	x	x		
Import customer data	x	x	x		

Teams / Departments / Branches					
Access groups	x	x	x	x	x
Manage groups	x				
Export groups	x	x	x		
Import groups	x				

TimePunch Client 2.8

Public holidays					
Access public holidays	x	x	x	x	x
Manage public holidays	x	x			
Export public holidays	x				

Public time entry filter					
Access public time entry filter	x	x	x	x	x
Manage public time entry filter	x	x	x		

Staff member profiles					
Access staff member profiles	x	x	x	x	x
Manage staff member profiles	x	x			
Export staff member profiles	x	x			
Import staff member profiles	x				

Authorization role					
Access authorization	x	x	x	x	x
Authorize staff member	x				

Password management					
Manage passwords	x	x	x	x	x
Reset passwords	x				

Licenses					
Manage licenses	x	x^2	x^2	x^2	x^2
Display license keys	x				

---

[2] Only the licenses of the profiles that are managed by the employee can be maintained.

Amending the recording settings

In TimePunch the recording settings for the TimePunch Watcher can be managed centralized for all users. This can be done with a the options dialog at the menu Extras.
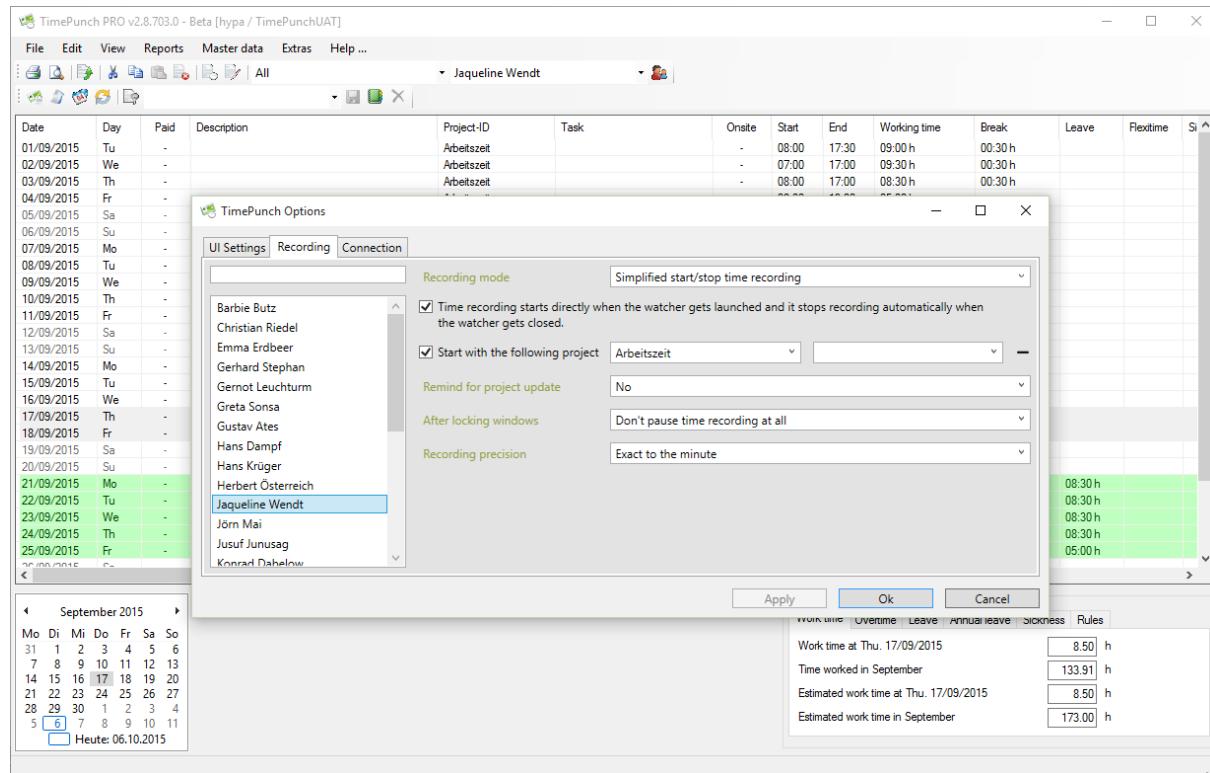
The different recording options are described in detail within the user manual of TimePunch Watcher.

But it's important to know, that the settings can be managed centralized. Because if a user only owns the right to record only times, he can't change those settings.

Quitting of employees

If employees are leaving the enterprise they cannot be deleted in TimePunch due to their existing time entries.

And even if it would be possible, deleting the time entries is not recommended because the times may needed in the future. Because of this reason the times of employees who left the enterprise can be archived.

This access permission will be revoked from the staff when applying the role of "No access". In addition, the license of the employee should be removed, so that they in turn can be given to a new employee.

To the staff member profile must be opened and the register management must be selected.
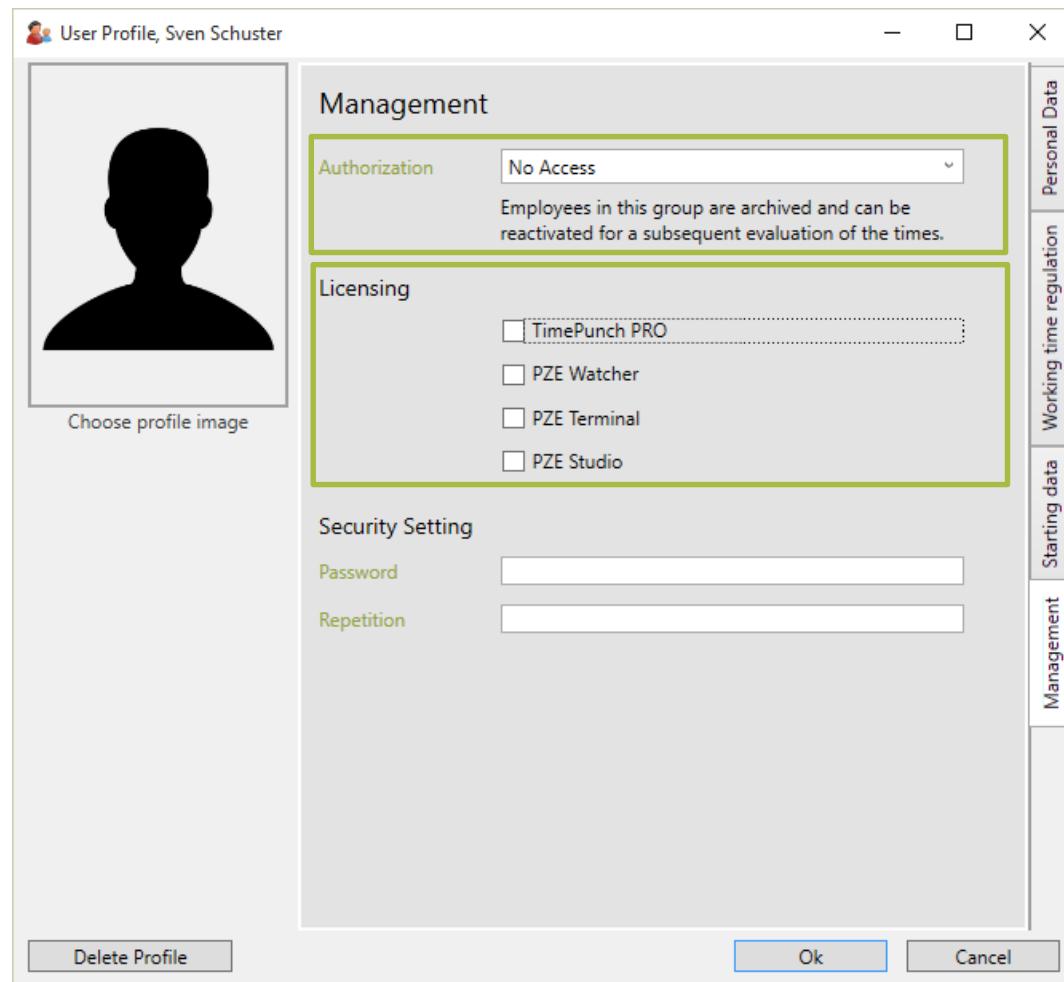
As an alternative, revoking the license and the access can be achieved via the button "delete profile".

License management

TimePunch license management is opened via the menu "help / manage licenses"
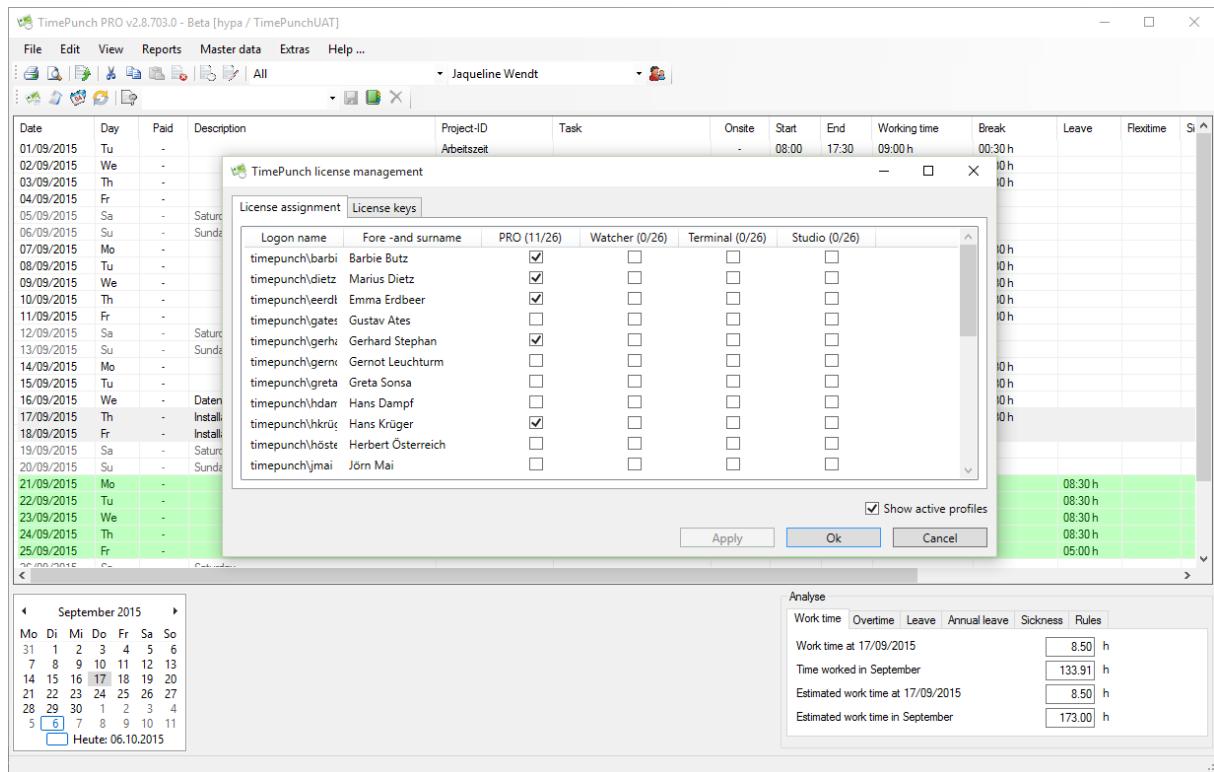
Enter the license key

Before licenses can be mapped to the individual employees, the license key must be entered. This is done in the tab "License key".
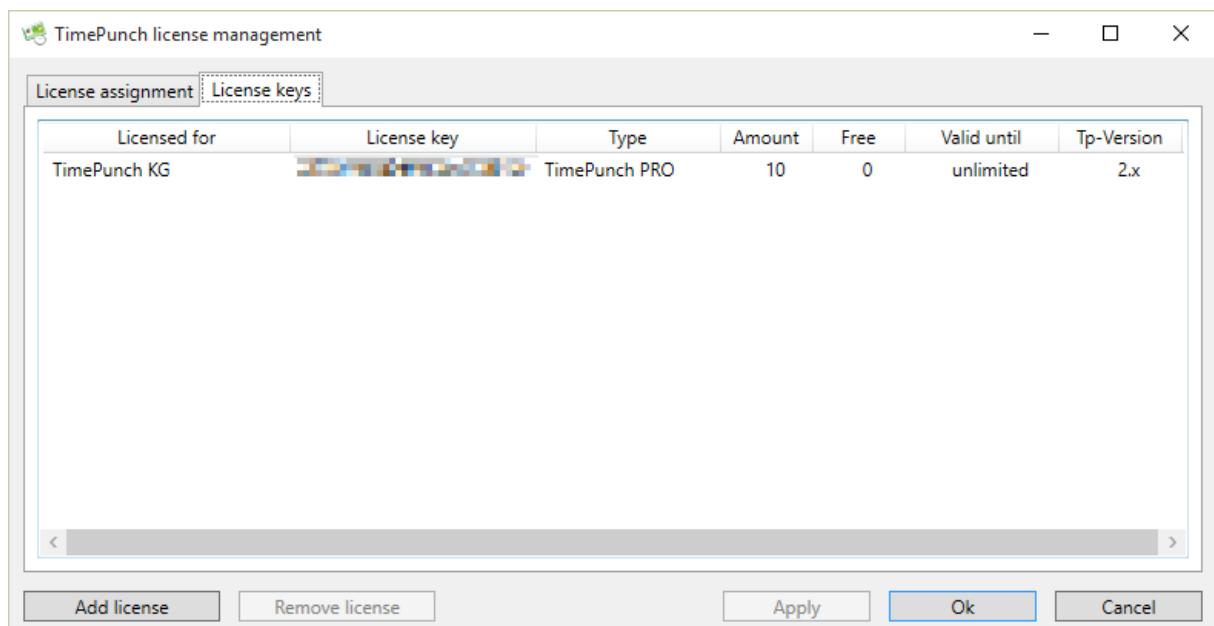
By clicking on the button "Add license" opens a dialog in which the new key is entered.
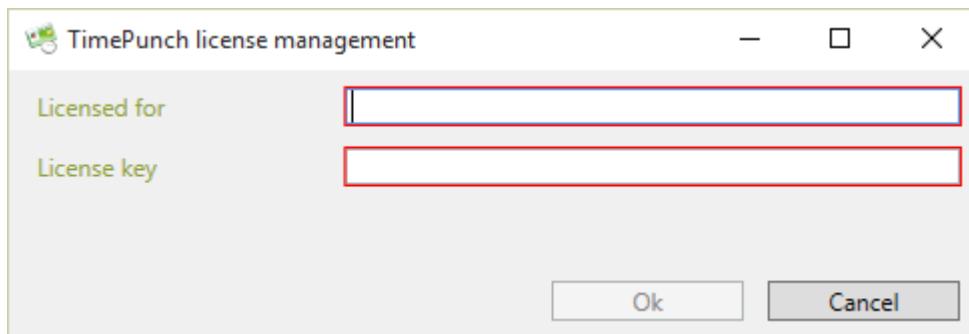
By clicking on the "Ok" button, the license is acquired and displayed in the dialog.

Assign licenses to the employees

The acquired and so registered licenses will now be assigned to the employees. This, the combination employee/license in the tab "License mapping" is ticked accordingly and saved with a click on "Apply" or "Ok".
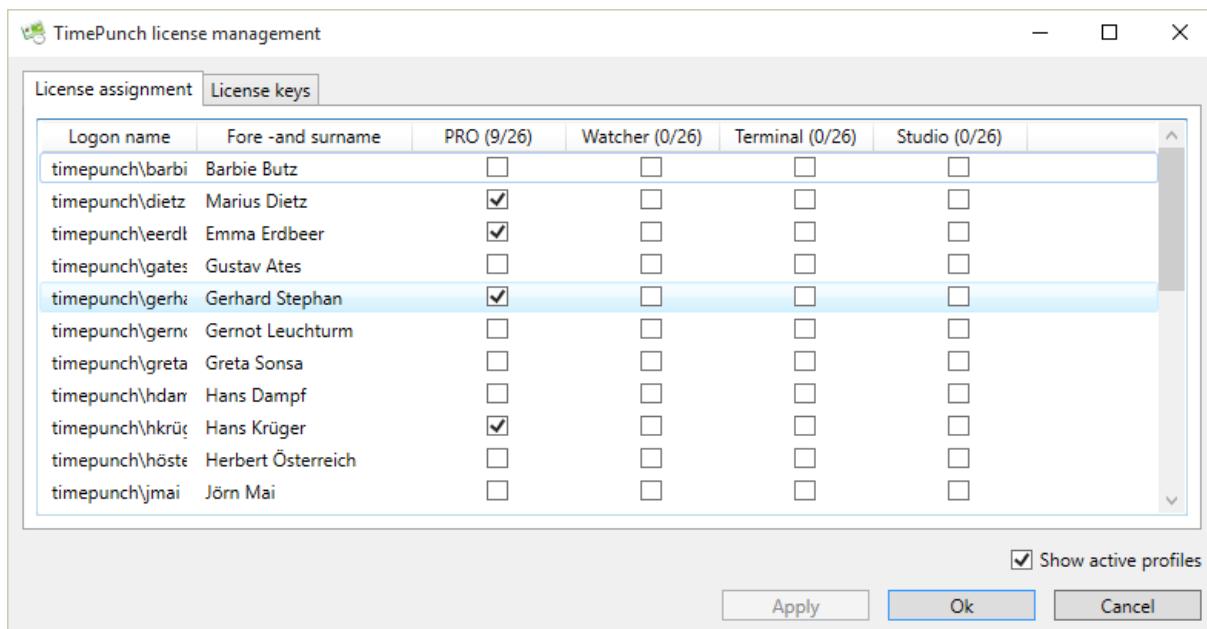
Types of licenses in TimePunch

Additionally to the kind of licenses in TimePunch there are different types of licenses available. This types allow access to the complete system or only to part aspects.

TimePunch PRO

This license is a version that is required in the human resources department to evaluate the working hours of employees. The TimePunch PRO license offers an efficient staff management including vacation planning, flexitime accounts / overtime management, monthly reports, and extensive project management functions.

Alternatively this license can be used also for each employee for time recording, since it includes all PZE licenses (Terminal/Watcher/Studio).

PZE Watcher

This license includes the use of the TimePunch Watcher to record the working time on your own PC. No time attendance terminal is required for this license.

The time is recorded as soon as the employee logs on to his workstation PC. In addition, the working time can be booked on various projects. The number of licenses is dependent on the number of employees. The time-evaluation will be done with the TimePunch PRO license in the personnel office or project management.

PZE Studio

This license includes the use of TimePunch Studio to record the work time at a community PC, e.g. in a garage, a practice or in a Studio. For each employee an own PZE Studio license is required.

The working time is recorded when the staff member logs on in TimePunch Studio. In addition, the working time can be booked on various projects. The number of licenses is determined by the number of employees. The time-evaluation will be done with the TimePunch PRO license in the personnel office or project management.

PZE Terminal

Only the Coming and the Going of staff members is recorded at the time recording terminal, either via RFID employee ID cards or keychain. The number of licenses is dependent on the number of employees. The time-evaluation will be done with the TimePunch PRO license in the personnel office.

License matrix

The following table shows the various licenses and their use and licensing opportunities.

Usage	TimePunch PRO	PZE Watcher	PZE Studio	PZE Terminal
TimePunch PRO Windows Client	x			
TimePunch Watcher	x	x		
TimePunch Studio	X		x	
TimePunch time recording terminal	X			X

Tips and Tricks

The following pages contains useful tips and tricks that can ease the work with TimePunch.

Month end closing and overall performance

The month end closing that can be done in TimePunch has to big benefits. First it prevents deleting previous recorded time-entry accidentally, because they get locked. Second it keeps the performance of TimePunch at a good level, because the times are set and there's no need for a recalculation.

Because of this reasons the month end closing should be done on a regular base, either by the staff member for their own times, or by the personnel office for all staff.

In TimePunch PRO the month end closing can be executed in menu 'Extras / Month-end closing'.
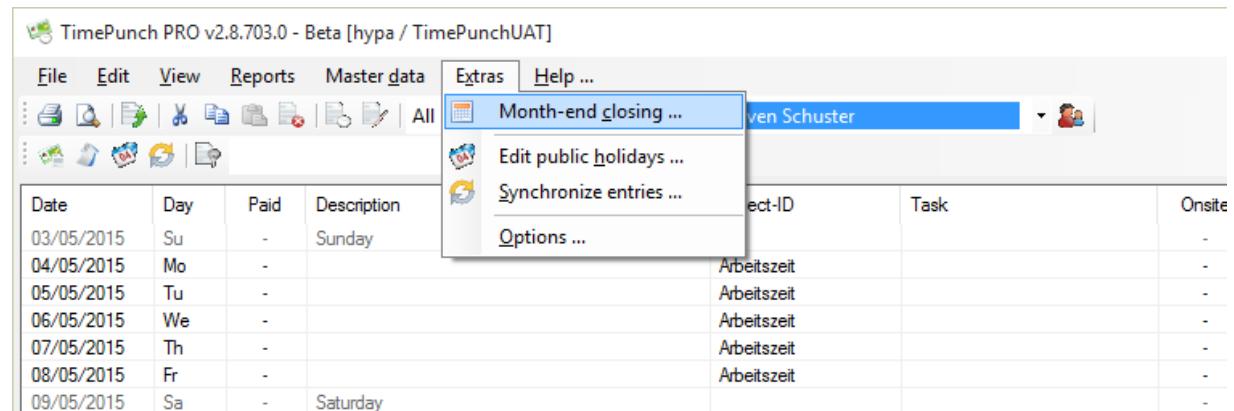
The following dialog appears.
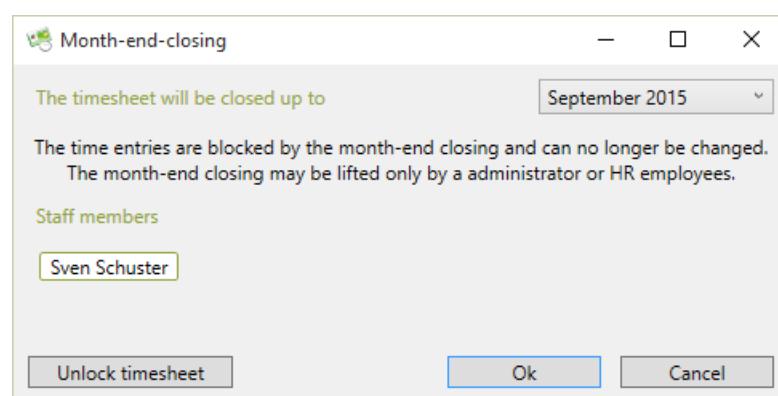
Here, the staff selects the month until that the time entries should be fixed. The month-end closing is performed by clicking on the "Ok" button.

The personnel office can perform month end for all employees by selected staff in the master data and then the click to button "Month-end closing".

Also here opens the dialog for the month-end closing. After selection of the period to be closed it must be confirmed by the "Ok" button. The hours before the selected date will then be closed.
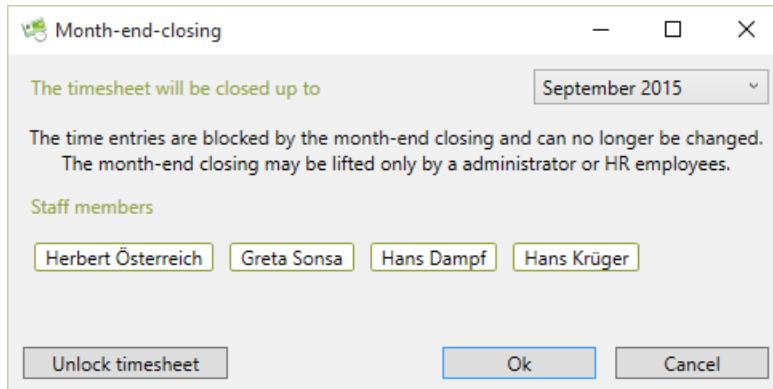
Import of time entries from Microsoft Excel

Using the command line tool 'TpCommand' it is possible to import excel files that have been created with a defined set of columns.

How this can be achieved is described in detail within the user manual of TimePunch Command. At this place we only want to tell you that it is possible in case you need it to import time entries from previous time entry recording systems.

Christmas and Sylvester

Christmas and Sylvester are no official public holidays, but most enterprises offer their employees a half day off.

Solution 1: Christmas and New Year's Eve is working half a day, the company gives the employees a half-day back.

If this is also in your company, Christmas and New Year's Eve must be entered in the TimePunch holiday. Both days are not stored as public holidays by default, because they are no public holidays.

To enter these two days the holiday editor must be opened via the menu "Extras / Edit public holidays".
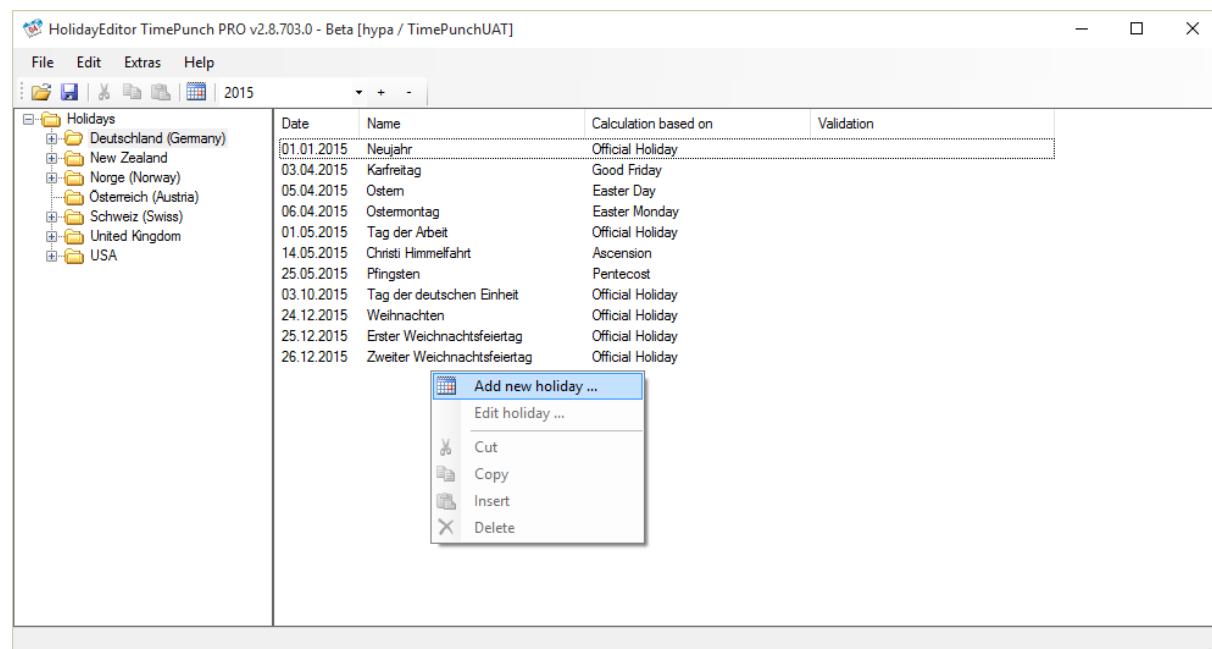

Now, the country must be selected. A new holiday for "Christmas" is added via the context menu (accessible from the right click). It is important that the mark "1/2 holiday" and the date are set correctly.
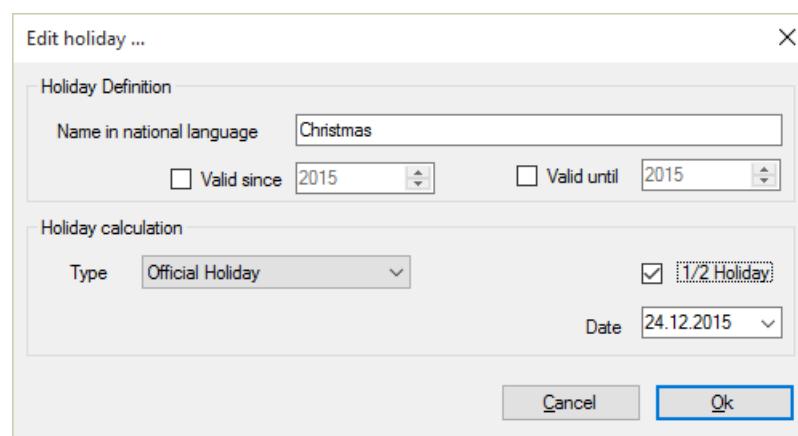
After entering the holidays the data must be stored with a click to the "Save" button. After that the new holidays are available in TimePunch.

Solution 2: Christmas and Sylvester treated as normal leave days

In this case Christmas and Sylvester can be added as a public holiday within the holiday editor. Accordingly to that, the employees' annual leave must be reduced by 2 days in order to reflect the additional holidays.

As described previously, the holiday editor must be opened and one needs to add a new holiday for Christmas and New Year's Eve. In contrast to the solution 1 Christmas and New Year's Eve are a full holiday.
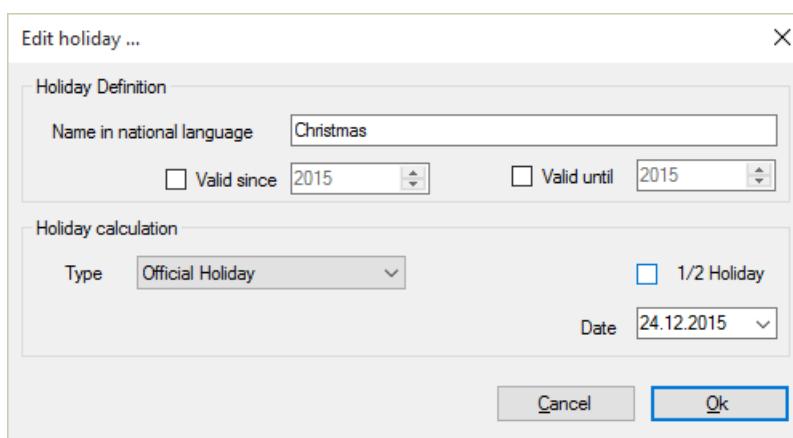
Solution 3: Christmas and New Year's Eve are regular working days. Should the employee wish a day, he must apply for leave.

This is the simplest solution because no new public holidays must be applied. The staff provides a leave request, which will be entered on approval by the human resources department in TimePunch.
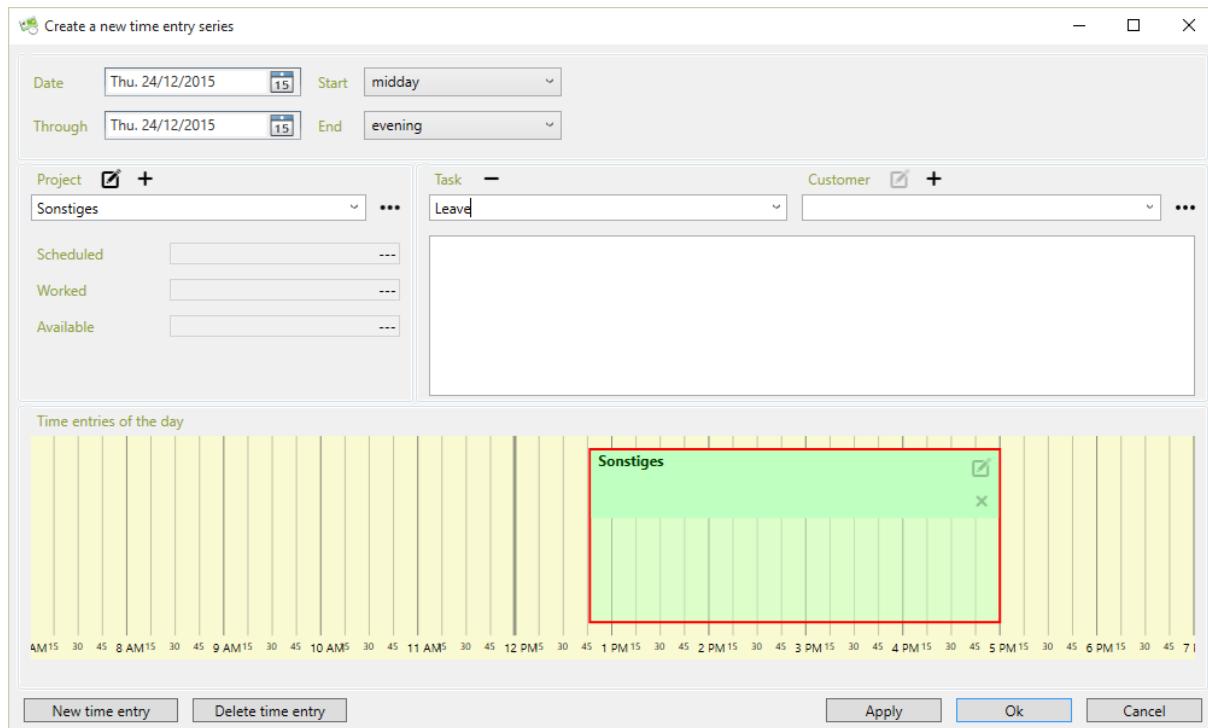
Automatic time-recording without possibility to manipulate

By knowing how to set up TimePunch it is possible to configure it in a way, that no the staff member can't manipulate the recorded working time.

The following steps are necessary:

The working time model of the staff member should contain an automatic break of 30 minutes after 6 hours. With that setting can be ensured, that the break time settings are always applied.

As a second the staff member should only have the right to record the working time. With this setting it can be ensured that the working times cannot be amended.
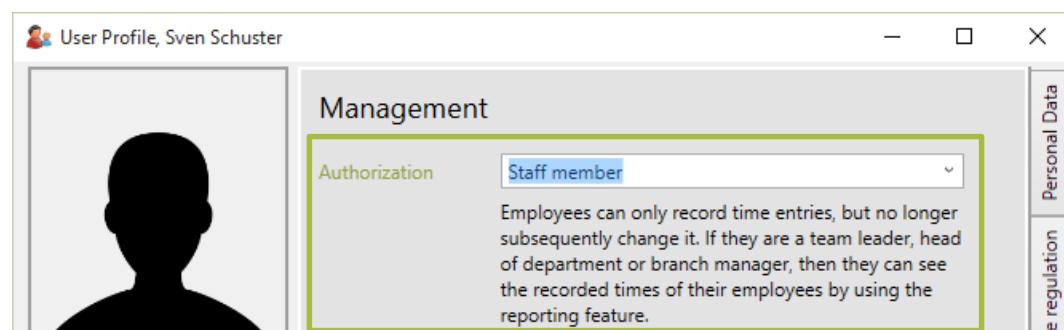
Additionally the recording options should be set in a way that the staff member cannot stop the time recording. This prevents a willful stopping of the recording.

Another important point is that the time recording shall be stopped when windows get locked. In order not to track each short break (e.g. toilette) it's recommended to enter 15 minutes fairness time.
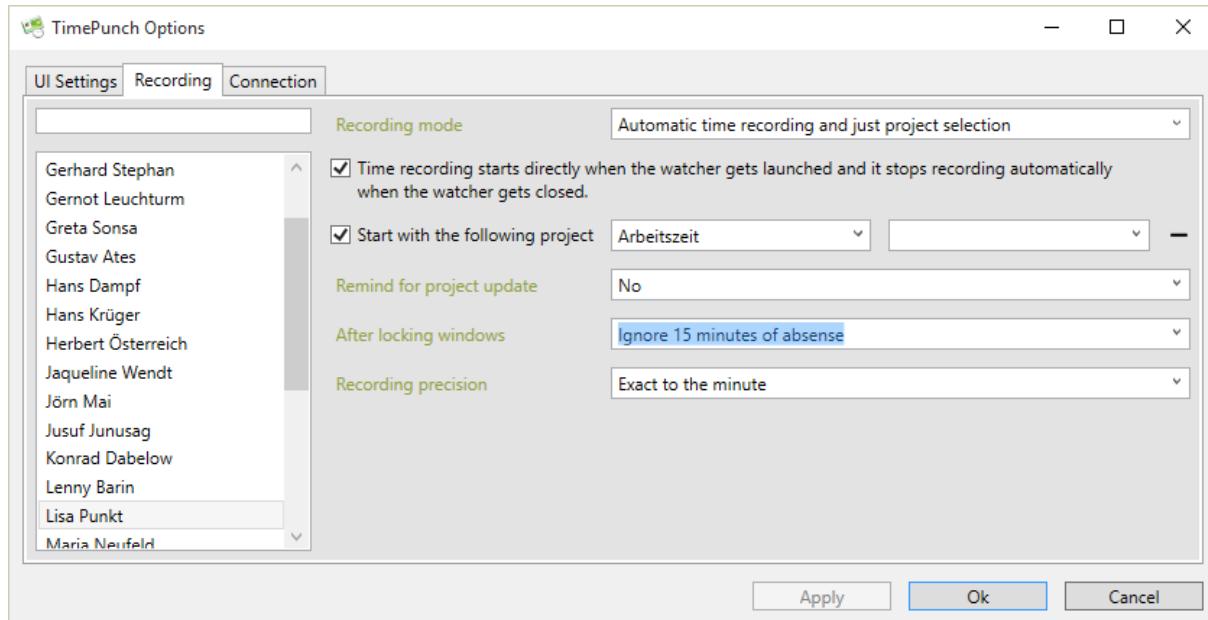
In order to make the setting "after locking windows pause time recording" work, the screen saver must be configured accordingly. This can also be done via the domain settings for all domain users.

End of the Document